

# TBA Tax Law Forum 2022

Sept. 30 – AllianceBernstein, Nashville



## Program Producer:

Michael Goode, Lewis Thomason

**Total Credits:** 4 General, 1 Dual

This year's Tax Law Forum makes it return as an in-person event, taking place at the Nashville headquarters of global asset management firm AllianceBernstein. Don't miss this chance to learn from top experts while meeting with other tax law experts and industry leaders.

11:30 a.m. – 12 p.m. CDT      **Registration** – Refreshments provided by AllianceBernstein

12 – 1 p.m..

### **2022 Tennessee Tax Updates**

This session will cover hot topics and updates on recent legislation, litigation and rulings.

Bernadette Welch, Tennessee Department of Revenue

Phil Fitzgerald, Tennessee Department of Revenue

1 – 2 p.m.

### **Required minimum distributions**

Shelton Swafford, Chambliss Bahner & Stophel

2 – 2:15 p.m.

### **Break**

2:15 – 3:15 p.m.

DUAL

### **Ethical Issues Relating to Tax Law Practice**

This session will cover ethical issues commonly encountered by tax lawyers, including the representation of organizations, conflicts of interest, and confidentiality.

Steven Christopher, Tennessee Board of Professional Responsibility

3:15 – 4:15 p.m.

**Over-rated? How Surging Interest Rates and Slow Growth May Radically Change Wealth Transfer Planning**

For the past decade, historically low interest rates—not valuation discounts or the huge gift and estate tax exclusion (currently \$12.06 million)—have been the cornerstone of wealth transfer planning strategies established by ultra-high-net-worth families. But with surging interest rates and low growth expectations, that is likely to change. In this interactive session, Tom Pauloski, National Managing Director of Bernstein's Wealth Strategies Group, will discuss why these seismic economic changes may profoundly affect how tax professionals advise wealthy families. The next generation of wealth transfer plans may look more like those created in the 1990s than like recent plans, which have been driven largely by near-zero capital costs.

**Tom Pauloski, AllianceBernstein**