

UNITED STATES TAX COURT

JUDICIAL CONFERENCE



May 20 - 22, 2015

Durham, North Carolina

| | | |
|---------------------------------------|---|--|
| Wednesday, May 20, 2015 | | Washington Duke Inn |
| 6:00 pm | Dinner Reception | Presidents Ballroom and Terrace (weather permitting) |
| Thursday Morning, May 21, 2015 | | Fuqua School of Business |
| 7:30 am | Breakfast | McClendon Dining Room |
| 8:45 am | Opening Remarks <i>The Honorable Michael B. Thornton</i> <i>Chief Counsel William J. Wilkins</i> <i>Tax Section Chair Armando Gomez</i> | Geneen Auditorium |
| 9:15 am | Expanding Access to Justice <i>The Honorable Peter J. Panuthos, Moderator</i> <i>Janice R. Feldman, IRS Office of Chief Counsel</i> <i>T. Keith Fogg, Villanova School of Law Federal Tax Clinic</i> <i>Nina E. Olson, National Taxpayer Advocate</i> <i>Andrew R. Roberson, McDermott Will & Emery LLP</i> | |
| 10:00 am | Refreshment Break | |
| 10:20 am | Expert Witnesses: Creative Approaches: Pros and Cons (What Is Wrong and How Do We Fix It?) <i>The Honorable Kathleen Kerrigan and</i> <i>The Honorable Mary Ann Cohen, Moderators</i> <i>David J. Curtin, Morgan, Lewis & Bockius LLP</i> <i>Robin L. Greenhouse, McDermott Will & Emery LLP</i> <i>Dana Hundrieser, IRS Office of Chief Counsel</i> | |
| 11:30 am | View from the Appellate Bench: Appeals from the Tax Court <i>The Honorable John O. Colvin and</i> <i>The Honorable Tamara W. Ashford, Moderators</i> <i>The Honorable Johnnie B. Rawlinson,</i> <i>United States Court of Appeals for the 9th Circuit</i> <i>The Honorable James A. Wynn, Jr.,</i> <i>United States Court of Appeals for the 4th Circuit</i> | |
| 12:30 pm | Lunch | McClendon Dining Room |

| | |
|--|---|
| <p>2:00 pm</p> <p>concurrent sessions</p> | <p>Privileges and Waivers Room 3041</p> <p><i>The Honorable Robert P. Ruwe and The Honorable Lewis R. Carluzzo, Moderators Michael J. Desmond, The Law Offices of Michael J. Desmond, APC Kevin G. Gillin, IRS Office of Chief Counsel Timothy L. Jacobs, Hunton & Williams Kevin Spencer, McDermott, Will & Emory LLP</i></p> <hr/> <p>Tools of Statutory Construction Room 3043</p> <p><i>The Honorable Albert G. Lauber, Moderator Mark E. Cottrell, IRS Office of Chief Counsel Craig W. Hoffman, Georgetown Law School Richard L. Schmalbeck, Duke University School of Law Ethan Yale, University of Virginia Law School</i></p> <hr/> <p>Discovery and Pretrial Practice Room 3037</p> <p><i>The Honorable Joseph R. Goeke, Moderator Jill A. Frisch, IRS Office of Chief Counsel Brian W. Kittle, Mayer Brown LLP Christopher S. Rizek, Caplin & Drysdale Chartered</i></p> |
| <p>3:15 pm</p> | <p>Refreshment Break</p> |
| <p>3:45 pm</p> <p>concurrent sessions</p> | <p>“Any and all documents” Meets ESI Room 3041</p> <p><i>The Honorable Ronald L. Buch, Moderator The Honorable Paul W. Grimm, United States District Court for the District of Maryland Tara S. Emory, Driven, Inc. Mark L. Hulse, IRS Office of Chief Counsel Julia M. Kazaks, Skadden, Arps, Slate, Meagher & Flom LLP</i></p> <hr/> <p>And What Weight Do They Have? Room 3043 Agency Determinations and Unpublished Opinions</p> <p><i>The Honorable James S. Halpern, Moderator Mary B. “Handy” Hevener, Morgan Lewis & Bockius LLP Emily M. Lesniak, IRS Office of Chief Counsel Andrew R. Roberson, McDermott Will & Emery LLP Patrick J. Smith, Ivins, Phillips & Barker, Chartered</i></p> <hr/> <p>Clinics and Calendar Call Programs Room 3037</p> <p><i>The Honorable Daniel A. Guy, Jr., Moderator Steven R. Mather, Kajan, Mather and Barish Susan Morgenstern, Taxpayer Advocate Service Scott Schumacher, University of Washington School of Law Derek Wagner, Pro Bono Counsel, ABA Tax Section</i></p> |

| Thursday Evening, May 21, 2015 | | Washington Duke Inn |
|---------------------------------------|---|---------------------------------|
| 6:30 pm | Seated Dinner A Conversation with Justice Scalia <i>David F. Levi, Dean, Duke University School of Law, Moderator</i> | Presidents Ballroom |
| Friday Morning, May 22, 2015 | | Fuqua School of Business |
| 7:30 am | Breakfast | McClendon Dining Room |
| 8:45 am | Conflicts and Chaos: The Importance of Timely Recognizing and Managing Conflicts of Interest in Tax Litigation <i>The Honorable L. Paige Marvel, Moderator</i> <i>Michael J. Desmond, The Law Offices of Michael J. Desmond, APC</i> <i>Miriam L. Fisher, Latham & Watkins LLP</i> <i>Ashton "Hap" P. Trice, IRS Office of Chief Counsel</i> | Geneen Auditorium |
| 10:00 am | Refreshment Break | |
| 10:15 am | Best Practices before the Tax Court <i>The Honorable Juan F. Vasquez</i> <i>The Honorable Mark V. Holmes</i> <i>The Honorable Richard T. Morrison</i> <i>The Honorable Lewis R. Carluzzo</i> | |
| 11:30 am | Closing Remarks <i>The Honorable Michael B. Thornton</i> | |
| 11:45 am | Lunch (Dine in or Take out) | McClendon Dining Room |



Attire for the Wednesday reception and throughout the conference is business casual.
Attire for the Thursday evening seated dinner is cocktail (or business) attire.