# Massachusetts Tax Update: Annual Spotlight on Recent Developments

## Time & Location

**Wednesday, June 19, 2013**  
2:00 - 5:00 p.m.  
*Reception to Follow*

**Boston Bar Association**  
16 Beacon Street  
Boston, MA 02108

**Questions and Directions:**  
(617) 778-2020  
cle@bostonbar.org

## Important Information

**Wi-Fi**  
Connect to our complimentary wireless and access your electronic materials via your mobile device or laptop.

**CLE Credit**  
Boston Bar Association Continuing Legal Education courses are approved for credit in California, Maine, New Hampshire, New York, Rhode Island & Vermont.

**Can't attend?**  
If you have pre-registered for a program and cannot attend, the BBA will forward all seminar materials to you at the address indicated on your registration form.

**Refunds and Cancellations**  
Refunds will be allowed for cancellation notices received at least 24 hours before the program.

**Accommodations/Assistance**  
We strive to make our programs accessible to all attendees, including those with disabilities. Please contact the BBA in advance of the program for arrangements.

**Tuition Assistance**  
If the cost of this seminar would preclude you from attending, contact us about tuition discounts.

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### Registration Form

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<thead>
<tr>
<th>Registration Categories</th>
<th>Amount</th>
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<tbody>
<tr>
<td>BBA Member</td>
<td>$130.00</td>
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<tr>
<td>Non-Member</td>
<td>$170.00</td>
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<td>BBA Member - Legal Services/</td>
<td>$70.00</td>
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<td>BBA Member - Government Lawyer</td>
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<tr>
<td>Law Student</td>
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**Course materials format:**
- Print version
- Electronic (link to a PDF of materials will be e-mailed prior to seminar)

**I cannot attend.** Please send me the CLE Program Package, which includes written materials and an audio CD (Prices include 6.25% sales tax).

- BBA Member  $165.00 (audio CD)
- Non-Member  $195.00 (audio CD)

**Payment Options**
- Check made payable to the Boston Bar Association
- MasterCard  Visa  AmEx  Discover
- Invoice (Members only)

Credit Card #:  
Exp. Date:

**Registration Information**

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Phone:  
E-mail:

**Register By**

**Mail:**  
Boston Bar Association  
CLE 11541  
P.O. Box 845680  
Boston, MA 02284-5680

**Online:**  
www.bostonbar.org/edu/cle  
Phone: (617) 778-2020  
Fax: Credit card info. to  
(617) 523-0127 Attn CLE
This popular annual program is your one stop shop for a comprehensive review of the latest legislative changes, administrative pronouncements, and trends in Massachusetts tax litigation and policy. Decision makers and regulators from the Massachusetts Department of Revenue will join seasoned tax practitioners to address a variety of topics concerning state taxation, including the corporate excise, sales/use tax, personal income tax, tax policy and procedure, and more.

Join us to hear about all the highlights from the past year in Massachusetts taxation and to learn more about what is on the horizon for the upcoming months and year.

**Program Co-Chairs**

Richard L. Jones, Esq.
Sullivan & Worcester LLP

Leanne E.S. Oneschuk, Esq.
McGladrey LLP

**Sponsored By:**
The BBA’s Tax Section and State and Local Tax Committee

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**Opening Remarks/Welcome**

Richard L. Jones, Esq.
Sullivan & Worcester LLP
program co-chair

Leanne E.S. Oneschuk, Esq.
McGladrey LLP
program co-chair

**Keynote Address**

Amy Pitter, Esq.
Commissioner of the Department of Revenue, Commonwealth of Massachusetts

**Panel Presentations**

*Massachusetts Legislative and Policy Developments and Trends*

Robert A. Carleo, Esq.
Director, Multistate Tax Services
Deloitte Tax LLP

David S. Davenport, Esq.
Deputy Commissioner and Senior Policy Counsel, Massachusetts Department of Revenue

Joseph X. Donovan, Esq.
Counsel, Sullivan & Worcester LLP

Jonathan B. Muroff, Esq.
Partner, State and Local Tax PricewaterhouseCoopers LLP

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**Department of Revenue Administrative Developments and Public Written Statements**

Michael T. Fatale, Esq.
Chief, Rulings and Regulations
Massachusetts Department of Revenue

David J. Nagle, Esq.
Partner, Sullivan & Worcester LLP

David Sheehan, Esq.
Managing Director, State and Local Tax Services
PricewaterhouseCoopers LLP

**Massachusetts Tax Litigation Update**

Thomas W. Hammond, Jr., Esq.
Chairman, Massachusetts Appellate Tax Board

Philip S. Olsen, Esq.
Partner, Burns & Levinson LLP

Kathleen King Parker, Esq.
Partner, Pierce Atwood LLP