

**Thanks to our sponsors!**



**Tuesday, August 14, 2018**

3:00 – 6:30 p.m.	<b>Registration</b>
3:30 – 4:45 p.m.	<p><b>What's Hot – Noteworthy Property Tax Cases that will Impact Businesses</b> (<i>joint session with the Indirect Tax Regional Meeting</i>)</p> <p>Be in the know. The speakers in this session will provide an update of the important cases that were decided over the past year. They will analyze those cases and analyze their impact on businesses.</p> <p>Speakers: Josh Hennessey, KPMG*, Houston, TX Mark Loyd, Bingham Greenebaum Doll*, Louisville, KY</p>
4:45 – 5:30 p.m.	<p><b>Outlook for the Rest of 2018</b> (<i>joint session with the Indirect Tax Regional Meeting</i>)</p> <p>Now that all of the important property tax cases have been discussed and analyzed, it's time to focus on property tax legislative policy issues - what happened this year and what is likely to occur through the rest of 2018. This session will cover issues that will impact your company's bottom line.</p> <p>Speakers: Nikki Dobay, COST, Washington, DC Fred Nicely, COST, Washington, DC Daniel Smith, Popp Hutcheson*, Austin, TX</p>
5:30 – 6:30 p.m.	<p><b>Welcome Reception</b></p> <p>Don't miss this opportunity to jump start your property tax networking with friends and colleagues with some appetizers and libations. It's a great way to get geared up for the meeting.</p>

**Wednesday, August 15, 2018**

7:30 a.m. – 5:45 p.m.	<b>Registration</b>
7:30 – 8:15 a.m.	<b>Continental Breakfast / Networking</b>
8:15 – 8:30 a.m.	<p><b>Welcome &amp; Opening Remarks</b></p> <p>Charles Drury, COST, Washington, DC Gary Hunter, AT&amp;T, Dallas, TX Douglas Lindholm, COST, Washington, DC Paul Sanderson, International Property Tax Institute, Bedford, UK</p>

8:30 – 9:30 a.m.	<p><b>Importance of the “Story” to Support the Valuation Numbers</b> Assessors don’t want to just see the numbers. They also want the story behind the valuation numbers. The presenters in this session will provide their experiences in providing the narrative to support the numbers.</p> <p>Speakers: Gilbert Davila, Popp Hutcheson*, Austin, TX Adrienne Hojnowski, Altus Group*, Baltimore, MD</p>
9:30 – 10:30 a.m.	<p><b>Proactively Address Property Tax Issues – Minimize the Need to Appeal</b> Why wait for the assessor to mail you a notice? It’s always time to proactively manage your property tax operations to prevent disputes before they start. Based on years of working together to resolve property-tax disputes cost-effectively, the speakers in this session will give you tips to improve the way you interact with assessors, strategies on when and how to leverage outside help for maximum benefits, and ideas for successfully managing your company’s overall property tax operations.</p> <p>Speakers: Jeffrey Bennett, Bingham Greenebaum &amp; Doll*, Indianapolis, IN Patrick Price, DuCharme McMillen &amp; Associates*, Huntsville, AL</p>
10:30 – 10:45 a.m.	<p><b>Refreshment Break / Networking</b></p>
10:45 – 11:30 a.m.	<p><b>Choice of 2 Breakouts</b></p>
	<p><b>Just Want the Basics (or a Refresher) - Valuation Issues for the Beginner</b> All three valuation approaches will be addressed in this session: cost, market and income approaches. While this session is geared to the basics, we all know it’s good to get a refresher from time-to-time. This session will cover valuation issues at a 10,000-foot level.</p> <p>Speakers: Craig Becker, Pillsbury Winthrop Shaw Pittman*, Palo Alto, CA Kirk Garza, Popp Hutcheson*, Austin, TX</p>
	<p><b>Living in the Trenches – Best Practices to Handle Complex Valuation Issues</b> This session will get into the weeds, property tax issues at dirt level will be reviewed for those with years of experience.</p> <p>Speakers: Steven Eakins, Equitable Value, Toronto, Ontario, Canada Brad Hasler, Bingham Greenebaum Doll*, Indianapolis, IN</p>
11:35 a.m.- 12:25 p.m.	<p><b>Choice of 2 Breakouts</b></p>
	<p><b>Tips &amp; Tricks for Effective Personal Property Tax Compliance</b> This session will raise awareness to some of the nuances of compliance which can help avoid over-assessment, non-compliance and excess time. The speakers will walk through each state and provide tips on what you need to know, as well as some general tricks related to efficiently managing volumes of fixed assets, assessment notices and tax bills. It will also touch on which states are actively auditing and how to prepare your records for audit within your compliance process.</p> <p>Speakers: Corinne Krikstan, Altus Group US*, Baltimore, MD Industry Speaker TBD</p>
	<p><b>Conquering the Myth of Sisyphus: Get Intangibles Excluded and Obsolescence Claims Accepted in Valuations</b> It is not always easy to tell where intangibles are hiding out in your assessments. Have you made sure that they are excluded? What about obsolescence? The speaker in this session will provide guidance on how to make sure your intangibles are removed from assessments and on the treatment of embedded software. In addition, the documentation you’ll need to support your obsolescence claims and the recent IAAO article on intangibles will be discussed.</p>

	<p>Speaker: Cris O’Neill, Greenberg Traurig*, Irvine, CA</p>
12:25 – 1:30 p.m.	<b>Lunch – Networking</b>
1:30 – 2:20 p.m.	<b>Choice of 2 Breakouts</b>
	<p><b>Don’t Let the Assessor Commingle Your Property - Strategies to Separate Personal Property from Real Property</b></p> <p>It is important to make sure your property is taxed only once per year. One way of making sure this happens is to compare what valuations for certain types of property are included on real and personal property tax rolls. The speakers in this session will offer guidance on the best methods to make sure your real and personal property are not taxed twice.</p> <p>Speaker: Breann Robowski, Pillsbury Winthrop Shaw Pittman*, Palo Alto, CA</p>
	<p><b>California Dreamin’ – Handling Property Tax Issues in the Golden State</b></p> <p>Are you taking advantage of appeal opportunities in California related to clerical errors, valuation issues, and/or double taxation? Are you aware of all of the procedural requirements for appeals? What is the impact of the recent reorganization of the SBE? These and other California property tax issues will be covered in this session.</p> <p>Speakers: Brandon Lancer, Altus Group*, Baltimore, MD Bradley Marsh, Greenberg Traurig*, San Francisco, CA</p>
2:30 – 3:20 p.m.	
	<p><b>Communications Companies – Voice &amp; Data Property Tax Issues</b></p> <p>Sound familiar -- unfair central assessment valuation, denied obsolescence, useful-life tables that are too long, taxing property not used in business? These issues and others will all be addressed with a focus on their impact within the communications industry.</p> <p>Speakers: Ryan Ivey, Duff and Phelps*, Addison, TX Robert Merten, Pillsbury Winthrop Shaw Pittman*, Sacramento, CA</p>
3:20 – 3:35 p.m.	<b>Refreshment Break / Networking</b>
3:35 – 4:25 p.m.	<b>Choice of 2 Breakouts – Industry Breakouts</b>
	<p><b>Incentives and Credits – Taking Advantage of All Opportunities</b></p> <p>Minimizing your property tax bill involves not only making sure your property is fairly valued, but also taking advantage of all of the credits and other incentive programs offered by the state and its local governments where the property is located. In this session, the speakers will provide information on these incentives and suggestions on maximizing the benefits offered.</p> <p>Speakers: Ian Molyneux, DuCharme McMillen &amp; Associates*, Indianapolis, IN Chaney Moore, Chevron Phillips Chemical Company, The Woodlands, TX Blas Ortiz, Popp Hutcheson*, Austin, TX</p>
	<p><b>Property Tax Issues for Distribution Centers and Retailers – Including “Shine the Light on ‘Dark Stores’”</b></p> <p>This session will primarily address property tax issues that both distributors and retailers must deal with. Unique property tax issues at the retail and wholesale level will also be discussed. The speakers in this session will also update attendees on recent developments in the “dark store” issue from both a litigation and legislative standpoint.</p> <p>Speakers: Patrick Broome, Altus Group*, Baltimore, MD Robert Gordon, Michael Best &amp; Friedrich*, Milwaukee, WI</p>
4:35 – 5:45 p.m.	<p><b>Audit Session and Property Tax Committee Meeting</b></p> <p>Open solely to industry members, this popular and valuable session allows industry members to update each other on the property tax issues they face. Additionally, the participants will find out if others have experienced similar issues in those jurisdictions.</p>

	<p>Time will also be set aside to convene a meeting of the Property Tax Committee for attendees to present topic suggestions and other ideas for future Property Tax Workshops.</p> <p>Speakers:  Nikki Dobay, COST, Washington, DC  Brigit Dubois, Amazon.Com, Seattle, WA  Fred Nicely, COST, Washington, DC  Nancy Riedel, Verizon, Highlands Ranch, CO  Patrick Reynolds, COST, Washington, DC</p>
6:00 – 7:00 p.m.	<p><b>Reception</b>  Now that your brain is filled with the most current property tax knowledge, let COST and the sponsors reward your hard work with cocktails, lots of delicious food and good conversation. Share your thoughts and experiences from the first full day with others and gain new perspectives.</p>
<b>Thursday, August 16, 2018</b>	
7:30 a.m. – 3:00 p.m.	<b>Registration</b>
7:30 – 8:15 a.m.	<b>Continental Breakfast / Networking</b>
8:15 – 8:20 a.m.	<b>Welcome Back!</b>
8:20 – 9:30 a.m.	<p><b>Property Tax Issues Around the World – IPTI Update – With Special Focus on Canada and the United Kingdom</b>  The International Property Tax Institute will provide the latest updates on the property tax issues that folks are facing up in Canada and across “the pond” in the United Kingdom.</p> <p>Speakers:  Jeff Grad, Equitable Value, Toronto, Ontario  Paul Sanderson, IPTI, London, UK</p>
9:40 – 10:45 a.m.	<b>Choice of 2 Breakouts</b>
	<p><b>Coordinating Property Taxes with Other Taxes and Other Departments</b>  Property taxes can’t be optimally handled without taking into consideration their relationship with other taxes and other departments. Transactions and decisions made by operations can greatly impact a property tax bill, just as a property tax assessment, and how it is handled, can affect other departments and other operations. It is important that the lines of communication remain open at all times to avoid any surprises.</p> <p>Speakers:  Heather Buser, KPMG*, Portland, OR  Brian Heard, KPMG*, Houston, TX</p>
	<p><b>Structuring Tax Purchases to Avoid Additional Costs such as Documentary Transfer Taxes (and Change of Ownership in California)</b>  The speaker in this session will discuss the best and most widely used structuring techniques that are used to acquire property without triggering additional expenses (or change of ownership!).</p> <p>Speaker:  Bradley Marsh, Greenberg Traurig*, San Francisco, CA</p>
10:45 – 11:00 a.m.	<b>Refreshment Break / Networking / Hotel Checkout</b>
11:00 – Noon	<b>Choice of 2 Breakouts</b>
	<p><b>How to Handle the Ever-Present "Lifetime Bureaucrat Personality"</b>  A variety of different stereotypical types of appraisers and assessors exist in the world of property taxation. This panel will focus on dealing with the ever-present lifetime bureaucrat personality, the person who doesn't want to do the work and only wants to tell you "no."</p> <p>Speakers:  Jeffrey Bennett, Bingham Greenebaum &amp; Doll*, Indianapolis, IN  C. Stephen Davis, Greenberg Traurig*, Irvine, CA</p>

	<p><b>Keep the Assessors Honest - Equalization and Uniformity</b> Often inappropriately ignored, most states require property tax valuations to be equalized and/or uniform. The presenter in this session will give you tips to use the states' equalization and uniformity provisions to have your company's property valued equitably.</p> <p>Speaker: Kirk Glasby, DuCharme McMillen &amp; Associates*, Austin, TX</p>
Noon – 1:00 p.m.	Lunch – Networking
1:00 – 2:00 p.m.	<p><b>Maintaining Harmony - Viewpoint of and Feedback from the Assessors</b> COST plans on having a local and state assessor – with at least one assessor from Texas.</p> <p>Moderator: Ferdinand Hogroian, COST, Washington, DC</p> <p>Panelists: Windy Nash, Dallas Central Appraisal District, Dallas, TX Brent South, Chief Appraiser, Hunt County Appraisal District, Greenville, TX</p>
2:00 – 3:00 p.m.	<p><b>Ask the Experts – Panel of Practitioners from Accounting, Valuation and Legal Firms Addressing Issues from the Audience – Including Confidentiality in Property Tax Appeals</b> Really, free advice from practitioners? That's right! This is your chance to question practitioners and get their views on various Property Tax issues. Come with your questions prepared or submit them to us prior to the session and we'll ask the questions for you. It's a relaxed forum so please feel free to participate early and often!</p> <p>Moderator: Fred Nicely, COST, Washington, DC</p> <p>Panelists: Kirk Glasby, DuCharme McMillen &amp; Associates*, Austin, TX Robert Gordon, Michael Best &amp; Friedrich*, Milwaukee, WI Jeff Grad, Equitable Value, Toronto, Ontario, Canada Ryan Ivey, Duff and Phelps*, Addison, TX Mark Loyd, Bingham Greenebaum Doll*, Louisville, KY Cris O'Neill, Greenberg Traurig*, Irvine, CA Alex Powell, Altus Group*, Southlake, TX Paul Sanderson, International Property Tax Institute, Bedford, UK</p>

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