

FLORIDA RESIDENCY SEMINAR SERIES 2014

Seminar

Palm Beach & Naples, FL
January & February 2014

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Florida Residency: How you know you have it, and what you may want to do if another state says you don't.

This seminar provides information on income tax, homestead, and estate planning issues and guidance on how you may be able to reduce taxes, protect assets, and avoid pitfalls when moving from another state or maintaining dual residences.

Choose from four sessions:

- **Tuesday, January 28, 2014**
Eau Palm Beach Resort & Spa, Palm Beach, 2 to 4 p.m.
- **Wednesday, January 29, 2014**
The Ritz-Carlton, Naples, 2 to 4 p.m.
- **Wednesday, February 26, 2014**
The Ritz-Carlton, Naples, 2 to 4 p.m.
- **Thursday, February 27, 2014**
Eau Palm Beach Resort & Spa, Palm Beach, 2 to 4 p.m.

Our speakers will provide information about compliance with state residency rules. Unfortunately, many people have learned about these rules the hard way. With good intentions, they did all the things they thought they needed to do in order to take up residency outside of their old state - they filed affidavits of domicile in the new state, registered their automobiles in that state, obtained new driver's licenses, and registered to vote. Sounds like they did all the right things, right?

Wrong! Most people aren't aware that a residency determination is based on more than mere declarations or physical presence in the state. In a residency case, the burden of proof is on the taxpayer. Even after you've moved out of one state, if you maintain living quarters in that state and visit from time to time, you may still be considered a resident of that state for tax purposes.

Attorneys

Katherine Cauley
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Practices & Industries

State & Local Tax
Trusts & Estates



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This seminar will provide you with information on issues that may be beneficial in protecting your assets and avoiding pitfalls when moving out of a state or maintaining dual residences:

- New Residency and Allocation Issues
- Proactive Preparation for Nonresident Audits
- New Estate Tax Legislation: What Does It Mean?
- Florida: What's Different?
- What Is a Statutory Resident and Why Should You Care?
- Current Planning Techniques (Including an Update on Family Limited Partnerships)
- Protecting Your Assets and Reducing Tax on Transfers to Your Family
- Other Hot Topics

Who should attend: Individuals with dual residences, non-Florida residents, in-house tax counsel, accountants, tax managers, financial planners, insurance executives, high-net-worth individuals

While primary emphasis will be on New York's approach to residency issues, the concepts discussed are applicable throughout the United States.

This seminar is pending approval for 2 hours of technical business continuing professional education credit by the Florida Department of Business & Professional Regulation, Sponsor/Provider #0002615, pending approval by the CFP Board for 2 hours continuing education credit, Sponsor/Provider #3503, and pending approval by The Florida Bar for 2.5 hours of general CLER credit.

Contact Courtney Pfeffer if you have any additional questions.