

# NAREC 2014 ANNUAL FINANCIAL & TAX CONFERENCE

JUNE 17-20

NAREC   
REAL ESTATE FINANCE PROFESSIONALS

# NAREC



REAL ESTATE FINANCE PROFESSIONALS

## NAREC 2014 ANNUAL FINANCIAL & TAX CONFERENCE, JUNE 17-20 CHARLESTON PLACE • CHARLESTON, SOUTH CAROLINA

Please join us as we learn from top experts the latest business, financial and tax strategies and trends impacting the real estate industry. We provide a wonderful opportunity to “meet and mingle” with fellow members and other real estate financial professionals from across the country, all while enjoying the historic sites of Charleston.



### HOTEL INFORMATION

Located at the very heart of downtown Charleston, this luxurious hotel blends old-world charm with a leading-edge spa and innovative cuisine. Call the hotel by May 17 to book your room at the \$245/night rate. Rate is honored three days pre/post meeting based on availability.

Charleston Place • 205 Meeting Street • Charleston, South Carolina 29401 • 800.831.3490

THANKS TO OUR CONFERENCE SPONSORS!



**Deloitte.**



Learning Objective: At this conference, you will enhance your knowledge of the real estate industry while learning practical applications and updates on emerging accounting, tax and technology issues.

Program Level: Update

Prerequisite: A knowledge of the financial workings of the real estate industry. No advanced preparation required.

Delivery Method: Group Live

CPE total for Tax Conference (Tue. – Wed.): 14.0

CPE total for Financial Conference (Wed. start at 10:30am – Fri.): 15.5

CPE total for both (Tue. – Fri.): 24.0

Refund/Cancellation Policy: Conference registration fees are not refundable after May 31.

Refund requests should be made in writing by mail or email.

Please contact the NAREC office at 312.263.1755 or [info@narec.org](mailto:info@narec.org) regarding any concerns or questions.



NAREC is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education of the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE sponsors, 150 Fourth Ave. North, Suite 700, Nashville, TN 37219-2417. Web site: [www.nasba.org](http://www.nasba.org)

# TAX CONFERENCE SCHEDULE

## TUESDAY, JUNE 17, 2014

- |                  |   |
|------------------|---|
| 8:00 – 8:30 am   | CONTINENTAL BREAKFAST   |
| 8:30 – 9:45 am   | Tax Planning for Real Estate Transactions<br>Stephen Owen, Partner, DLA Piper US LLP  |
| 9:45 – 11:00 am  | Creative Planning for Partnership Liability Allocations, Including the New Proposed Regulations<br>Blake Rubin, Partner, McDermott Will & Emery LLP |
| 11:00 – 11:15 am | NETWORKING BREAK  |
| 11:15 – 12:30 pm | Tax Issues in Issuing Compensatory Partnership Interests<br>Jim Sowell, Principal, KPMG LLP   |
| 12:30 – 1:30 pm  | LUNCH   |
| 1:30 – 2:45 pm   | State and Local Tax Update<br>Michele Randall, Director, Deloitte LLP   |
| 2:45 – 3:00 pm   | NETWORKING BREAK  |
| 3:00 – 4:00 pm   | Hot Topics Discussion<br>NAREC Tax Committee  |
| 4:00 – 5:00 pm   | HAPPY HOUR (Dinner On Your Own)   |

## WEDNESDAY, JUNE 18, 2014

8:30 – 9:00 am CONTINENTAL BREAKFAST (Financial Conference attendees are welcome to attend)

9:00 – 10:15 am Tax Credits and Incentives for Real Estate Developers  
Jeff Horein, Partner, Baker Tilly

10:15 – 10:30 am NETWORKING BREAK

## TAX & FINANCIAL CONFERENCE SCHEDULE

10:30 – 11:00 am Annual Meeting of Members and Financial Conference Kickoff  
Mike Heiken, Conference Chair

11:00 – 12:15 pm Washington Legislative Update  
Bob Schachat, Director-Technical Services, Real Estate, National Tax Dept., Ernst & Young

12:15 – 2:30 pm LUNCH - Public/Private Initiatives  
Michael Maher, CEO, Horizon Project Foundations, Inc.

2:30 – 3:45 pm Real Estate Update  
Mike Straneva, Partner, American Real Estate Leader, Ernst & Young

3:45 – 5:00 pm Capital Markets Update  
Michael Ryan, Senior Managing Director, Cushman & Wakefield

6:00 – 9:30 pm RECEPTION AND DINNER AT HOTEL

TAX CONFERENCE ENDS

# FINANCIAL CONFERENCE SCHEDULE

THURSDAY JUNE 19, 2014

- |                  |   |
|------------------|---|
| 8:00 – 8:30 am   | CONTINENTAL BREAKFAST   |
| 8:30 – 9:30 am   | Fraud Prevention & Cyber Security<br>Chris Quick, Special Agent, Federal Bureau of Investigation  |
| 9:30 – 9:45 am   | NETWORKING BREAK  |
| 9:45 – 11:45 am  | It's not just WHAT you say, but HOW you say it that makes the difference!<br>A primer in effective business and personal presentations.<br>Steve Felix & Elizabeth Weiner, Felix Consulting Group |
| 11:45 – 12:45 pm | LUNCH   |
| 12:45 - 1:45 pm  | What's Hot in Real Estate Development? Industrial, Office, Retail, Multifamily<br>Andrew Warren, Director of Real Estate Research, PricewaterhouseCoopers   |
| 1:45 – 2:00 pm   | NETWORKING BREAK  |
| 2:00 – 3:15 pm   | FASB/SEC Technical Update<br>Chris Dubrowski, Director of Professional Practice, Deloitte LLP   |
| 3:15 – 4:15 pm   | Automated Travel and Expense Solutions<br>Dan Floyd, Sr. Regional Executive, Concur   |
| 5:30 – 8:00 pm   | Charleston Adventure - Carriage Tour and Dinner at Magnolia's   |

## FRIDAY, JUNE 20, 2014

8:00 – 8:30 am

CONTINENTAL BREAKFAST

8:30 – 9:30 am

Best Practices in AP:P2P Automation

Thomas Runyon, Senior Vice President, Nexus Systems

9:30 – 10:45 am

Doc, Can You Prescribe Something to Boost My A/P Efficiency?

Mike Walford, Vice President-Treasury Management Working Capital Consultant, US Bank

Banking Portals

Randy Lade, Vice President- Global Treasury Management, US Bank

10:45 – 11:00 am

NETWORKING BREAK

11:00 – 12:00 pm

What Price is Right? A Discussion of Trends and Pain Points in Compensation & Benefits Programs

Rena Somersan, Principal, Verisight Group

FINANCIAL CONFERENCE ENDS

## REGISTRATION INFORMATION

Conference	Tax	Financial	Both
NAREC Member	\$650	\$995	\$1295
Non-Member	\$800	\$1295	\$1595
Spouse/Guest*	\$100	\$195	\$195

\*Welcomes participation in breakfasts, lunches, receptions and dinners.

To register, send this form with your check payable to NAREC to:

NAREC - 216 West Jackson Blvd., Suite 625 - Chicago, IL 60606

Or register online using a MasterCard or Visa at:

[www.NAREC.org](http://www.NAREC.org) (click on the Education tab)

Registration deadline is May 30, 2014

**TOTAL ENCLOSED \$**

## REGISTRATION FORM

Please indicate the conference(s) you plan to attend:

Tax Conference Only [June 17-18]

Financial Conference and Tax Conference [June 17-20]

Financial Conference Only [June 18-20]

First Name

Last Name

Badge Name/Nickname

Title

Company Name

Company Address

City

State

Zip

Phone

E-mail address

Spouse/Guest Name

List any dietary restrictions





NAREC 2014 ANNUAL FINANCIAL & TAX CONFERENCE