

2017 ANNUAL CONFERENCE

Federation of Exchange Accommodators

TO SERVE, PRESERVE AND ADVANCE 1031

FEA
FEDERATION
of EXCHANGE
ACCOMMODATORS

The Voice of the 1031 Industry

September 13-15, 2017 | Rancho Bernardo Inn | San Diego, California

WHAT'S DIFFERENT ABOUT FEA'S 2017 ANNUAL CONFERENCE?

"What's not different?" is the real question.

It's everything from the change in programming by adding a 1031 Reverse Exchange Boot Camp and complementary ride to the San Diego Gas Lamp District on Wednesday, to the extended reception with live music on Thursday. We've also added four quick, need-to-know 25-minute sessions on Friday.

And it's the location! The Rancho Bernardo Inn (RBI) is a Southern California spa and resort destination where you can play, relax, unwind and reconnect with your colleagues and friends while finding a little time for yourself. It offers an 18-hole golf course, spa and several dining options while each sleeping room features custom furniture, 42" flat screen TVs, luxury bath amenities, complimentary WiFi and private patios or balconies. RBI is also offering FEA guests \$125 green fees (a \$40 savings!), 10% spa discount, complimentary self-parking, no resort fee and complimentary concierge services.

Maybe this is the real question – Do you want to get off the roller coaster for a week of learning and relaxation? We have no doubt the answer is a resounding "YES" and we have the perfect opportunity for you to do so.



Rancho Bernardo Inn

17550 Bernardo Oaks Drive | San Diego, California 92128

www.ranchobernardoinn.com

Join us in Sunny San Diego

SEPTEMBER 13-15, 2017

RESERVE YOUR SLEEPING ROOM

To reserve your sleeping room online, go to <https://tinyurl.com/FEA2017ROOM>. Note that the Rancho Bernardo Inn's online system will only accept reservations that are within the contracted dates. Any guests requesting to extend their stay outside of the block must call the reservations team Monday-Friday from 7:00 a.m.-9:00 p.m. and Saturday and Sunday from 7:00 a.m.-7:00 p.m. at (800) 542-6096. Reference Group Block 1109FEA20.

Rooms are being held at the reduced rate of \$235 plus tax per night until **August 14, 2017**. Please make your reservations early. While the hotel will guarantee the lower room rate until August 14, 2017, this does not mean they can guarantee that rooms will be available. There are a limited number of rooms set aside at the hotel for FEA. Rooms are on a first-come, first-served basis.

IMPORTANT NOTE: By booking your room in an FEA room block, you are supporting your association. FEA guarantees the venue that a reasonable number of rooms will be purchased. If these rooms are not purchased, FEA is obligated to pay for them.

BOOK YOUR TRAVEL

The Rancho Bernardo Inn is located about 30 minutes from the San Diego International Airport (SAN). <http://www.san.org/>

A variety of options are available to get you to and from the airport. For information about taxi's, public transportation, car rentals and other transportation to and from SAN go here: <http://www.san.org/Parking-Transportation/Public-Transportation>. Lyft and UBER are also available.

Self-parking is complementary at the Rancho Bernardo Inn. Valet parking is \$25 per night.

CES® AND CLE CREDIT HOURS

CES® approved for twelve and a half (12.5) general CES® credit hours. 1031 Boot Camp is approved for four (4) CES® credit hours and 1031 Reverse Exchange Boot Camp is approved for three (3) CES® credit hours.

FEA has applied to the State Bar of California for Continuing Legal Education Credits (CLE). Approval is pending. Attendees who wish to receive CLE credit in other states may apply for approval to state bar(s) in which they are licensed.

COOKING DEMONSTRATION WITH THE RBI CHEF

On Wednesday, September 13 from 11:00 a.m.-1:00 p.m. you have the opportunity to team up with the Rancho Bernardo Inn's Executive Chef as he creates a California fresh fare for a fun, interactive experience that will generate a buzz and leave you king of the kitchen! RBI's Executive Chef will cook a savory entrée (one of RBI's seasonal favorites) side-by-side with you in the RBI's AVANT Kitchen. Lunch includes a glass of wine, ice water and iced tea. This optional event has a 15-person limit so be sure to sign up with your registration!



SAN DIEGO CLIMATE AND CONFERENCE ATTIRE

In most years, San Diego averages a daily maximum temperature for September that's between 73 and 79 °F. The minimum temperature usually falls between 63 and 67 °F. At night, the thermometer may dip to 60 °F or below. But September does not normally get as cold as 50 °F.

FEA recommends you check the weather and bring a wrap or sweater, just in case and don't forget the sun screen! It is a short walk between buildings for meals, breaks and general sessions.

Business casual attire is appropriate for all FEA Conference events.

Wednesday, September 13, 2017

- 7:30 a.m. CES® Exam Registration
- 8:00-10:30 a.m. CES® Exam
- 8:30 a.m.-12:30 p.m. **1031 Boot Camp**
Hugh Pollard, CES®, Investment Property Exchange Services, Inc.
- Reverse Division (IPX1031®)
- 9:00 a.m.-1:00 p.m. FEA Board of Directors Meeting
- 11:00 a.m.-1:00 p.m. Optional Activity: Cooking Demonstration with the RBI Chef
- 12:30-4:30 p.m. FEA Registration Desk Open
- 12:30-4:30 p.m. Exhibitor Set-Up
- 1:30-4:30 p.m. **1031 Reverse Exchange Boot Camp**
Martin Edwards, JD, CES®, Accruit, LLC
- 4:00-4:55 p.m. **New Member/First Time Attendee Orientation**
- 5:00-6:30 p.m. **FEA Board of Directors Welcome Reception for Attendees with Exhibitors (on site)**
- 6:50 p.m. Bus from Rancho Bernardo Inn to Gas Lamp District
Recommend making dinner reservations for 7:30 p.m.
- 10:30 p.m. Bus from Gas Lamp District to Rancho Bernardo Inn

Thursday, September 14, 2017

- 6:30-7:00 a.m. Exhibits Set Up
- 7:00 a.m.-5:00 p.m. FEA Registration Desk Open
- 7:00 a.m.-5:00 p.m. Exhibits Open
- 7:00-8:00 a.m. FEA Networking Breakfast
- 8:00-8:15 a.m. **Welcome and Opening Remarks**
Steve Chacon, CPA, CES®, FEA President
- 8:15-9:05 a.m. **Economic Update**
Chris Rupkey, Chief Financial Economist, MUFG
- *Mini 10-minute break for changing speakers*
- 9:15-10:05 a.m. **A Walk through the House Republican Blueprint "A Better Way"**
Suzanne Goldstein Baker, Esq., CES®, Executive Vice President
& General Counsel, IPX 1031®
- 10:05-10:35 a.m. **Networking Break with Exhibitors**

Thursday, September 14, 2017 cont.

10:35 a.m.-12:05 p.m. **View from the Hill and FEA Government Affairs Committee Update**
 David E. Franasiak, Esq., Williams & Jensen;
 Brent Abraham, CEO, Accruit, LLC;
 Suzanne Goldstein Baker, Esq., CES®, Executive Vice President &
 General Counsel, IPX 1031®;
 Max Hansen, J.D. CES®, President, American Equity Exchange, Inc.

..... *Mini 10-minute break for lunch seating*

12:15-1:30 p.m. **Lunch & FEA Annual Business Meeting**
 Steve Chacon, CPA, CES®, FEA President
 Lynn Harkin, CAE, FEA Executive Director

..... *Mini 10-minute break for re-assembly into meeting room*

1:40-2:30 p.m. **What Constitutes Qualifying Property**
 John Mangham, CPA, CES®, Regional Director, Starker Services, Inc.

..... *Mini 10-minute break for changing speaker*

2:40-3:30 p.m. **The Potential Impact of Tax Reform on Real Estate Investment**
 Evan Liddiard, Senior Policy Representative, Federal Taxation,
 National Association of Realtors®

3:30-4:00 p.m. **Networking Break with Exhibitors**

4:00-4:50 p.m. **Est. of George H. Bartell, Jr. vs. Commissioner Decision
 and Its Impact on Non-Safe Harbors Reverse Exchange Transactions**
 Mary B. Foster, Esq., CES®, Principal, 1031 Services, Inc.
 Warren (Skip) Kessler, Esq., Liner LLP

6:30-8:30 p.m. **Networking Reception (on site)**



Friday, September 15, 2017

- 7:30 a.m.–3:05 p.m. FEA Registration Desk Open
- 7:30 a.m.–2:15 p.m. Exhibits Open
- 7:30–8:30 a.m. FEA Breakfast and Committee Meetings
- 8:40–9:30 a.m. **Related Party Exchanges**
Julie Baird, Vice President & National Counsel, First American Exchange Company;
Max Hansen, Esq., CES®, President & CEO, American Equity Exchange, Inc.
- *Mini 10-minute break for changing speaker*
- 9:40–1:20 a.m. **Four Hot Topics in Rapid Succession**
- **Closing Costs in 1031 Exchanges.**
William Horan, CES®, Realty Exchange Corporation
 - **IRC Section 1031 and Installment Sale Issues.**
Kim Schooley, CPA, CES®, 1031 Accommodators, LLC
 - **Identification Issues.**
Steve Chacon, CPA, CES®, FEA President, Accruit, LLC
 - **Early Release of Funds in a 1031 Exchange.**
Warren (Skip) Kessler, Esq., Liner LLP
Moderator: Mary Cunningham, CES®, President,
Chicago Deferred Exchange Company
- 11:20–11:50 a.m. **Networking Break with Exhibitors**
- 11:50 a.m.–12:40 p.m. **Reverse Exchange Operational and Accounting Issues**
Ralph Bunje, CES®, Executive Vice President, 1031 Strategies & Services Group
Max Hansen, Esq., CES®, President & CEO, American Equity Exchange, Inc.
- *Mini 10-minute break for lunch seating*
- 12:50–2:00 p.m. **Lunch, President and Incoming President Messages, & CES® Address**
- *Mini 10-minute break for re-assembly into meeting room*
- 2:10–3:10 p.m. Exhibit Tear Down
- 2:10–3:00 p.m. **Tax Update**
Mary Foster, CES®, President, 1031 Services, Inc.
- *Mini 10-minute break for changing speaker*
- 3:10–4:00 p.m. **Impact of Cannabis on Commercial Real Estate**
Steve Waldman, Co-Founder, Ground Lease Capital
John Wunderlich, President, Investment Property Exchange Services, Inc. (IPX1031®)
Moderator: Scott Saunders, Sr. Vice President, Asset Preservation, Inc.
- 4:00–4:10 p.m. **Closing Comments**

**The schedule is subject to change to meet the needs of speakers, sponsors or attendees.*

For full session descriptions and speaker biographies, go to www.1031.org, choose Events, choose Annual Conference.

FEA 2017 Annual Conference

REGISTRATION FORM

A discount is given to registrants whose payment is received by end of day on **Wednesday, August 16, 2017.**

Option 1:

Conference Attendee Registration.	By August 16	After August 16
FEA Member (1 st person registering)	\$850	\$900
Multi-Delegate Rate <i>(additional person from same FEA member company)</i>	\$800	\$850
Non-FEA Member	\$950	\$1000

Option 2:

1031 Boot Camp. Additional Cost Applies.	\$250	\$275
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Option 3:

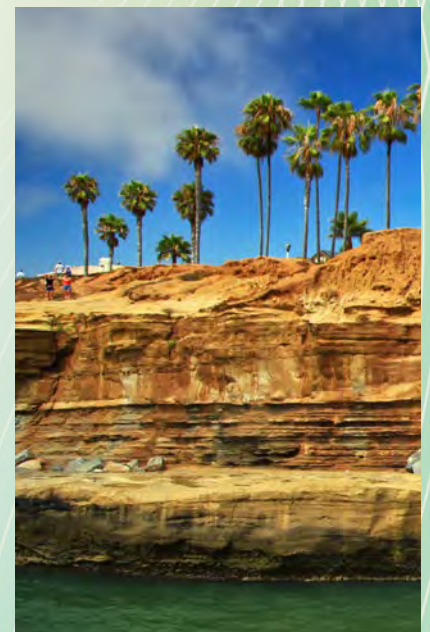
1031 Reverse Exchange Boot Camp. Additional Cost Applies.	\$250	\$275
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Option 4:

Guest Tickets for Wednesday and Thursday Receptions.	\$80	\$100
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Option 5:

Cooking Demonstration with the RBI Chef on Wednesday 11:00 a.m.-1:00 p.m. Additional cost applies. Includes lunch. Limit 15 participants.	\$97	\$97
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REGISTER

Register online at www.1031.org (Choose Events and Annual Conference), by fax (515) 334-1174 or by mail to FEA, 1255 SW Prairie Trail Parkway, Ankeny, Iowa 50023.

Questions? Contact Denise Hoffman, FEA Meeting Planner, meetings@1031.org or (515) 334-1049.

First Attendee:

Name _____
 Company Name _____
 Address _____
 City/State/Zip _____
 Phone _____
 Email _____
 Cell phone _____
for emergency purposes only
 Choose option(s): 1 2 3

Indicate dietary allergies, sensitivities, accessibility needs or medical conditions that require special attention _____

Additional Delegate(s) From Same Company *(if more than three, please attach an additional form):*

Name 1 _____
 Phone _____
 Email _____
 Cell phone _____
for emergency purposes only
 Choose option(s): 1 2 3

Indicate dietary allergies, sensitivities, accessibility needs or medical conditions that require special attention _____

Name 2 _____
 Phone _____
 Email _____
 Cell phone _____
for emergency purposes only
 Choose option(s): 1 2 3

Indicate dietary allergies, sensitivities, accessibility needs or medical conditions that require special attention _____

Name 3 _____
 Phone _____
 Email _____
 Cell phone _____
for emergency purposes only
 Choose option(s): 1 2 3

Indicate dietary allergies, sensitivities, accessibility needs or medical conditions that require special attention _____

Attendee registration fees include the receptions. Purchase additional tickets for guests.

• **If choosing Option 4** Guest Reception Ticket(s), indicate ticket quantity _____
 Indicate which reception(s) your guest is attending:
 Wednesday Thursday Both
 Guest Name(s) _____

• **If choosing Option 5** Cooking Demonstration with the RBI Chef, indicate ticket quantity _____
 Cooking Demonstration Attendee Names _____

<p>Registration Total including First Attendee and Additional Delegates _____ Guest Ticket Total _____ Cooking Demonstration Total _____ Grand Total Due _____</p>
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Payment Options

Please make check payable to FEA and mail to 1255 SW Prairie Trail Parkway, Ankeny, Iowa 50023 or register online at www.1031.org. If emailing the registration form, please omit payment information. FEA staff will contact you for the credit card number.

___ Check payable to FEA
 ___ MasterCard ___ Visa ___ AMEX

Account # _____
 Expiration Date _____ CVV _____
 Name on card _____
 Signature _____

Cancellation / Refund / Substitution Policy

The deadline for canceling or substituting conference registration is August 28. All cancellations are subject to a \$150 administrative fee. All requests for cancellations or substitutions must be submitted in writing to kkiping@aml.org. No refunds will be issued for cancellations made after Monday, August 28.



The Voice of the 1031 Industry

FEDERATION OF EXCHANGE ACCOMMODATORS
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Ankeny, Iowa 50023
(515) 244-6515
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meetings@1031.org

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Thank you to our 2017 FEA ANNUAL CONFERENCE SPONSORS



*Includes paid sponsorships as of July 14, 2017. Once paid, sponsors will be listed in electronic promotions and receive full benefits as indicated in the sponsor brochure. FEA is grateful to those who are committed to sponsoring the 2017 Annual Conference.

For more information about sponsorship, visit www.1031.org.