

# 2018



*The Voice of the 1031 Industry*

## ANNUAL CONFERENCE

Federation of Exchange Accommodators

*Building  
for the Future*



September 12–14, 2018 | Kansas City Marriott Country Club Plaza | Kansas City, MO

The 2017 “Tax Cuts and Jobs Act” preserves Section 1031 for real estate assets and eliminates exchanges for personal property. The law went into effect January 1, 2018.

This conference is all about real estate and offers the information you need to thrive in your new 1031 environment.

# SEPTEMBER 12–14, 2018

# 2018



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### The FEA Annual Conference allows ample time to connect with colleagues:



- ✓ Meet up for breakfast
- ✓ Stop by the receptions for drinks
- ✓ Connect during the networking breaks
- ✓ Interact in the exhibit area

And at the Kansas City Marriott Courtyard Plaza, the breaks and exhibitors are in the foyer right outside the general session room allowing for more interaction with exhibitors and each other during breaks.

### You can visit over 150 shops and eateries within walking



**distance** of the hotel including dining options such as The Cheesecake Factory, Capital Grill, Jack Stack Barbecue and Fogo de Chao. [countryclubplaza.com/merchants/dining/](http://countryclubplaza.com/merchants/dining/)

### Join Us Wednesday for BBQ



On Wednesday, September 12 from 12:45–3:45 p.m. travel through some of Kansas City's historic neighborhoods as you sample savory meats and side dishes from Kansas City's historic and hidden gem barbecue restaurants.

The 'Cue and Brew tour includes food and one complimentary beverage\* at three restaurants. **Only 30 spots are available**, so be sure to sign up when you register. Transportation is provided.

*\*The KC Barbecue Tours offers a menu already agreed upon between the restaurants and KC Barbecue Tours. Any additions to this menu may be subject to extra fees. Beverages are included in the ticket price and may include soft drinks, tea, lemonade and beer. Wine and liquor are not included in the ticket price.*

### Your Come Early and Stay Late Bucket List



✓ Get your Jazz on at the American Jazz Museum and Blue Room.

✓ Renaissance Festival is open on the weekends.



✓ Schedule a River Market Food Tour.

✓ Take a Street Car Tour.

✓ The My Fair Lady musical opens Thursday, September 13!



✓ For a unique exercise experience, try the underground 5K race track or paintball in an old mine.

✓ Or how about some indoor sky diving?



[www.visitKC.com](http://www.visitKC.com)

### Reserve your sleeping room



The Kansas City Marriott Country Club Plaza hotel is offering a special group rate of \$169.00 per night including complimentary WiFi in guest rooms. The room block drops August 20, 2018.

Book your room online at [tinyurl.com/FEA2018AC](http://tinyurl.com/FEA2018AC) or call (816) 531-3000 and mention FEA.

**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 Kansas City International Airport – MCI is about 23 miles or 30 minutes from the Kansas City Marriott Country Club Plaza.

For ground transportation options go to [www.flykci.com](http://www.flykci.com). Transportation to and from the airport is not provided.

### Marriott parking is subject to change:

- On-site self parking: \$17.00 daily
- Valet parking: \$21.00 daily
- Parking for 8 hours or less is \$8.00 self-parking or \$12.00 valet

### CES® and CLE Credit Hours

The FEA has applied for CES® credit hours. Approval is pending.

FEA has applied to the State Bar of California and The Missouri Bar 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.

### Kansas City Climate and Conference Attire



Average temperature for Kansas City mid-September is highs in the lower 80's with lows in the lower 60's.



FEA recommends you check the weather forecast and bring a wrap or sweater for chilly indoor air-conditioning.



Business casual attire is appropriate for all FEA Conference events.

### Antitrust Reminder

FEA offers these guidelines to protect you, your colleagues and your association from antitrust investigation:

- Don't discuss your prices or competitors' prices with a competitor (except when buying from or selling to that competitor) or anything which might affect prices such as costs, discounts, terms of sale or profit margins.
- Don't agree with competitors to uniform terms of sale, warranties or contract provisions.
- Don't agree with competitors to divide customers or territories.
- Don't act jointly with one or more competitors to put another competitor at a disadvantage.
- Don't try to prevent your supplier from selling to your competitor.
- Don't discuss your future pricing, marketing or policy plans with competitors.
- Don't discuss your customers with your competitors.



## 1031s Build America



## All Things Real Estate

We'll come together this year celebrating our success in retaining the §1031 tax code with strong programming designed to enhance your knowledge of exchanges and give you the tools to push through to a new level of success!

#FEA2018Annual

## Wednesday, September 12, 2018

- 7:30 a.m. CES® Exam Registration
- 8:00–10:30 a.m. CES® Exam
- 8:00 a.m.–12:30 p.m. FEA Board of Directors Meeting
- 8:30 a.m.–12:30 p.m. **1031 Boot Camp**  
(4 hrs) Hugh Pollard, CES®, Investment Property Exchange Services, Inc. - Reverse Division (IPX1031®)
- 12:30–4:30 p.m. FEA Registration Desk Open
- 12:30–4:30 p.m. Exhibitor Set-Up
- 12:45–4:15 p.m. Optional Activity: KC Barbeque 'Cue and Brew Tour
- 1:30 p.m.–4:30 p.m. **Reverse Exchanges: The Basics and Beyond**  
(3 hrs) Martin Edwards, JD, CES®, EVP & General Counsel, Accruit, LLC
- 4:35–5:20 p.m. New Member/First Time Attendee Orientation
- 5:30–7:00 p.m. FEA Board of Directors Welcome Reception

## Thursday, September 13, 2018

- 6:30–7:15 a.m. Exhibits Set Up
- 7:00 a.m.–4:00 p.m. FEA Registration Desk Open
- 7:00 a.m.–3:00 p.m. Exhibits Open
- 7:00–8:00 a.m. FEA Networking Breakfast with Exhibitors
- 8:00–8:30 a.m. **Welcome and Opening Remarks**  
Teresa Person, FEA President  
Michael Anderson, Vice President
- 8:30–9:20 a.m. (50 min.) **Navigating the Global Cross Currents:  
An Economic and Market Outlook**  
Paul Single, Managing Director  
– Taxable Fixed Income, City National Bank
- 9:20–9:45 a.m. Networking Break with Exhibitors

# Thursday, September 13, 2018 cont.

- 9:45–10:35 a.m. (50 min.) **View from the Hill and FEA Government Affairs Committee Update**  
 David E. Franasiak, Esq., Williams & Jensen;  
 Suzanne Goldstein Baker, Esq., CES®, Executive Vice President &  
 General Counsel, IPX 1031®;  
 Mary Cunningham, CES®, President, Chicago Deferred Exchange Co.  
 David Brown, CES®, President, Iowa Property Exchange, LLC
- 10:35–11:00 a.m. **Networking Break with Exhibitors**
- 11:00–11:50 p.m. (50 min.) **The FEA Code of Ethics**  
 David Gorenberg, Esq., CES®, Executive Vice President & Counsel,  
 Riverside 1031, LLC
- 11:50 a.m.–1:30 p.m. **Lunch & Annual Business Meeting**  
 Teresa Person, FEA President  
 Lynn Harkin, FEA Executive Director
- 1:30–2:20 p.m. (50 min.) **IRS Form 8824 Demystified!**  
 Lee David Medinets, Esq., CES®, Senior Counsel, Madison Exchange, LLC
- 2:25–3:15 p.m. (50 min.) **Replacement Property Solutions**  
 Geoff Flahardy, Dir. of National Accounts, ExchangeRight Real Estate, LLC  
 Tom Georges, Stan Johnson Company  
 Tracy Treger, Sr. Director - Corp. Strategy, Syndicated Equities  
 Nati Kiferbaum, Vice President, Inland Private Capital Corporation  
 Moderator: Ran Fuchs, Senior Vice President, Cantor Fitzgerald & Co.
- 3:15–3:40 p.m. **Networking Break with Exhibitors**
- 3:40–4:30 p.m. (50 min.) **Tax Update**  
 Mary Foster, CES®, President, 1031 Services, Inc.
- 6:00–7:30 p.m. **Networking Reception**



[www.visitKC.com](http://www.visitKC.com)





# Friday, September 14, 2018

- 7:30 a.m.–3:05 p.m. FEA Registration Desk Open
- 7:30 a.m.–2:50 p.m. Exhibits Open
- 7:30–8:30 a.m. FEA Breakfast and Committee Meetings
- 8:30–9:20 a.m. (50 min.) **Anatomy of an Exchange Agreement**  
David Shechtman, Drinker Biddle & Reath, LLP
- 9:25–10:15 a.m. (50 min.) **More Real Estate Tax Forms: 1099-S;Wp, 8288 (FIRPTA), etals**  
Lee David Medinets, Esq., CES®, Senior Counsel, Madison Exchange, LLC
- 10:15–10:40 a.m. Networking Break with Exhibitors
- 10:40–11:30 a.m. (50 min.) **Tax Implications of the Repeal of Personal Property Exchanges for Real Estate Investors**  
Bruce Johnson, Partner, Capstan  
Mike Roos, Partner, KPMG
- 11:30 a.m.–12:40 p.m. Lunch, President and Incoming President Messages, & CES® Address
- 12:40–2:20 p.m. (100 min.) **Four Hot Topics in Rapid Session**  
Moderator: Mary Cunningham, CES®, President, Chicago Deferred Exchange Company
- **Hot Topic 1:** Various Ways to Hold Title to Real Estate  
Steve Wayner, Esq., CES®, President, Liberty 1031, LLC
  - **Hot Topic 2:** Economics of Investing in Real Estate  
Ran Fuchs, Senior Vice President, Cantor Fitzgerald & Co.
  - **Hot Topic 3:** Quick Overview of Existing State Regulatory Regimes  
Steve Chacon, CPA, CES®, Vice President, Exchange Service Operations, Accruit, LLC
  - **Hot Topic 4:** Quick Overview of State Withholding Requirements and Other Claw Back Provisions  
Craig Brown, Esq., Investment Property Exchange Services
- 2:20–3:10 p.m. Networking Break with Exhibitors
- 3:10–4:00 p.m. (50 min.) **Leasehold Improvement Exchanges; Ground Lease Transactions with Related Parties, Air Right Exchanges and other Non-Real Estate Exchanges**  
Scott Saunders, Senior Vice President, Asset Preservation, Inc.
- 4:00–4:10 p.m. Closing Comments
- SCHEDULE IS SUBJECT TO CHANGE



# FEA 2018 ANNUAL CONFERENCE

## REGISTRATION FORM

Discounted pricing, as listed below, is available to registrants whose payment is received by end of day on **Wednesday, August 20, 2018**. The early bird rate will not be extended.

### Option 1:

Conference Attendee Registration.	By August 20	After August 20
FEA Member (1 <sup>st</sup> person registering)	\$895	\$995
Multi-Delegate Rate <i>(additional person from same FEA member company)</i>	\$845	\$945
Non-FEA Member	\$1050	\$1150
First Time Attendee FEA Member	\$695	\$795
First Time Attendee Non-FEA Member	\$795	\$895

### Option 2:

1031 Boot Camp. <i>Additional Cost Applies.</i>	\$250	\$275
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### Option 3:

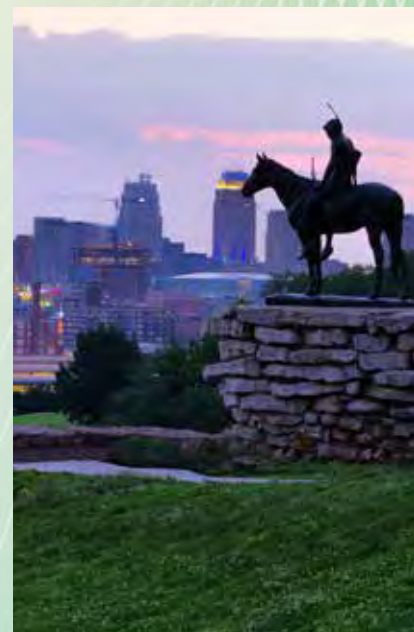
1031 Reverse Exchange Boot Camp. <i>Additional Cost Applies.</i>	\$250	\$275
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### Option 4:

Guest Tickets for Wednesday Light Reception and Thursday Heavy Reception.		
Wednesday	\$75	\$100
Thursday	\$100	\$125

### Option 5:

KC Barbeque Tour on Wednesday from 12:45–3:45 p.m. <i>Additional cost applies. Includes food and one beverage at each of the three restaurants. Bring cash for additional purchases. Transportation is provided. Limit 30 participants.</i>	\$80	\$80
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# REGISTER

Register online at [www.1031.org](http://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, CMP, FEA Meeting Planner, [meetings@1031.org](mailto:meetings@1031.org) or (515) 334-1049. If emailing the registration form, please omit payment information. FEA staff will contact you for the credit card number.

## First Attendee:

**Name** \_\_\_\_\_  
 Company Name \_\_\_\_\_  
 Address \_\_\_\_\_  
 City/State/Zip \_\_\_\_\_  
 Phone \_\_\_\_\_  
 Email \_\_\_\_\_  
 Cell phone \_\_\_\_\_  
*for emergency purposes only*  
 Choose option(s):  1  2  3  4  5 \$ \_\_\_\_\_

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  4  5 \$ \_\_\_\_\_

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  4  5 \$ \_\_\_\_\_

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

## 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](http://www.1031.org).

\_\_\_ Check payable to FEA  
 \_\_\_ MasterCard \_\_\_ Visa \_\_\_ AMEX  
 Account # \_\_\_\_\_  
 Expiration Date \_\_\_\_\_ CVV \_\_\_\_\_  
 Name on card \_\_\_\_\_  
 Signature \_\_\_\_\_

**Name 3** \_\_\_\_\_  
 Phone \_\_\_\_\_  
 Email \_\_\_\_\_  
 Cell phone \_\_\_\_\_  
*for emergency purposes only*  
 Choose option(s):  1  2  3  4  5 \$ \_\_\_\_\_

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)  
**Wednesday** (indicate ticket number) \_\_\_\_\_ Total \_\_\_\_\_

Guest Name(s) \_\_\_\_\_

**Thursday** (indicate ticket number) \_\_\_\_\_ Total \_\_\_\_\_  
 Guest Name(s) \_\_\_\_\_

• **If choosing Option 5** KC Barbeque Tour, indicate ticket quantity \_\_\_\_\_

KC Barbeque Tour Attendee Names \_\_\_\_\_

## Registration Total

including First Attendee and Additional Delegates \_\_\_\_\_

Guest Ticket Total \_\_\_\_\_

KC Barbeque Tour Total \_\_\_\_\_

Grand Total Due \_\_\_\_\_

## Cancellation / Refund / Substitution Policy

The deadline for canceling or substituting conference registration is August 20. All cancellations are subject to a \$150 administrative fee. All requests for cancellations or substitutions must be submitted in writing to [kkippling@aml.org](mailto:kkippling@aml.org). No refunds will be issued for cancellations made after Monday, August 20.





The Voice of the 1031 Industry

FEDERATION OF EXCHANGE ACCOMMODATORS  
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meetings@1031.org

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# Building for the Future

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\*Includes paid sponsorships as of June 29, 2018. 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 2018 Annual Conference.

For more information about sponsorship, visit [www.1031.org](http://www.1031.org).