



The Voice of the 1031 Industry

FEA 2019 Annual Conference

Big Ideas in the Big Easy

September 11–13, 2019

The Roosevelt Hotel, New Orleans

SCHEDULE OF EVENTS*

Wednesday, September 11, 2019

- 7:30 a.m. CES® Exam Registration – *Saenger Foyer*
- 8:00–10:30 a.m. CES® Exam – *Saenger*
- 8:00 a.m.–4:30 p.m. FEA Registration Desk Open – *Roosevelt Promenade*
- 8:00 a.m.–12:30 p.m. FEA Board of Directors Meeting – *Salon 4*
- 8:30 a.m.–12:00 p.m. (3.5hrs) **1031 Boot Camp** – *Salon 2*
Hugh Pollard, CES®, Investment Property Exchange Services, Inc. - Reverse Division (IPX1031®)
- 12:30–4:30 p.m. Exhibitor Set-Up – *Roosevelt Promenade*
- 12:45–4:15 p.m. Optional Activity: Mardi Gras World Tour and Mask Making – *Meet in the Lobby. Bring cash for gift shop.*
- 1:30 p.m.–4:30 p.m. (3hrs) **Reverse Exchanges: The Basics and Beyond** – *Salon 2*
Martin Edwards, JD, CES®, EVP & General Counsel, Accruit, LLC and Jordan Born, J.D., LL.M., Associate General Counsel, Accruit
- 4:35–5:20 p.m. New Member/First Time Attendee Orientation – *Bienville*
- 5:30–7:00 p.m. FEA Board of Directors Welcome Reception (Come hungry!) – *Blue Room*
- 7:15 p.m.–9:30 p.m. Optional Activity: Ghostly Spirits and Scandalous Tales Tour – *Meet in the Lobby.*

Thursday, September 12, 2019

- 6:30–7:15 a.m. Exhibits Set Up – *Roosevelt Promenade*
- 7:00 a.m.–4:15 p.m. FEA Registration Desk Open – *Roosevelt Promenade*
- 7:00 a.m.–3:25 p.m. Exhibits Open – *Roosevelt Promenade*
- 7:00–8:00 a.m. FEA Networking Breakfast – *Salons 1&2*
- 8:00–8:30 a.m. **Welcome and Opening Remarks** – *Salons 3,4,5*
- 8:30–9:20 a.m. (50 min.) **General Session: Economic Update** – *Salons 3,4,5*
Ted Jones, Chief Economist and Senior Vice President, Stewart Title Guaranty Company
- 9:20–9:45 a.m. Networking Break with Exhibitors – *Roosevelt Promenade*
- 9:45–10:35 a.m. (50 min.) **General Session: Government Affairs Committee and The View from Washington**
– *Salons 3,4,5*
Dave Franasiak, FEA Lobbyist, Williams and Jensen
Suzanne Goldstein Baker, Esq., CES®, Executive Vice President and General Counsel, Investment Property Exchange Services, Inc.
Dave Brown, CES®, President, Iowa Property Exchange, LLC
Mary Cunningham, CES®, President, Chicago Deferred Exchange Company
- 5-minute break to allow for speaker change*
- 10:40–11:30 a.m. (50 min.) **General Session: Related Party Exchanges – Risks and Opportunities** – *Salons 3,4,5*
Bradley T. Borden, Professor of Law, Brooklyn Law School; Special Counsel, Duval & Stachenfeld LLP, New York, New York
- 11:30 a.m.–1:00 p.m. **Lunch & Annual Business Meeting** – *Salons 1 & 2*



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- 1:00–1:50 p.m. (50 min.) **General Session: Cyber Fraud – How to Protect Your Business** – Salons 3,4,5
Thomas Linehan, ESVP, BankUnited
Suzanne Goldstein Baker, Esq., CES®, Executive Vice President and General Counsel,
Investment Property Exchange Services, Inc.
- 1:50–2:10 p.m. Networking Break with Exhibitors – Roosevelt Promenade
- 2:10–3:50 p.m. (100 min.) **Four Hot Topics (no, not Hot Pockets) in Rapid Succession** – Salons 3,4,5
- **Disaster Relief**
Stephen A. Wayner, Esq., CES®, President, Liberty 1031, LLC
 - **Fidelity and Cyber Risk Insurance**
Adam McDonough, Lockton Insurance Brokers, LLC
 - **The New Section 199A**
Kim Schooley, CPA, CES®, 1031 Accommodators, LLC
 - **Exchanges of Property with Some Personal Use**
James I. Miller, Esq., Investment Property Exchange Services, Inc.-Legal (IPX1031®)
- 3:50–4:10 p.m. Networking Break with Exhibitors - Roosevelt Promenade
- 4:10–5:00 p.m. (50 min.) **General Session: Annual Tax Update** – Salons 3,4,5
Mary B. Foster, CES®, President, 1031 Services, Inc.
- 6:00–7:00 p.m. **Networking Reception** (Light reception, make dinner reservations/plans.)
– Room Change: *Waldorf Astoria Ballroom (Mezzanine Level)*

Friday, September 13, 2019

- 7:30 a.m.–3:30 p.m. FEA Registration Desk Open – Roosevelt Promenade
- 7:30 a.m.–3:10 p.m. Exhibits Open – Roosevelt Promenade
- 7:30–8:30 a.m. FEA Breakfast and Committee Meetings – Salons 1&2
- 8:30–9:20 a.m. (50 min.) **General Session: Difficult, Tricky and Downright Thorny 1031 Situations**
– Salons 3,4,5
Moderator: Jeffrey R. Peterson, President, CPEC1031, LLC
Anne E. Andrews, Partner, PwC
Dan Cullen, Baker & McKenzie LLP
Lee David Medinets, Esq. is Chief Counsel, Madison Commercial Real Estate Services
Robert D. Schachat, Realty Exchange Corporation
David Shechtman, Drinker Biddle & Reath, LLP
- 5-minute break to allow for speaker change
- 9:25–10:15 a.m. (50 min.) **General Session: Partnership Exchanges – Accommodating Divergent Interests** –
Salons 3,4,5
Michael J. Tuchman, J.D. CPA, Corporate, Tax Planning and Real Estate, Levenfeld
Pearlstein, LLC
- 10:15–10:40 a.m. Networking Break with Exhibitors – Roosevelt Promenade
- 10:40–11:30 a.m. (50 min.) **General Session: Late Night with Ethics – An Irreverent Look at Ethical Issues
Affecting Like-Kind Exchanges**– Salons 3,4,5
David Gorenberg, JD, CES®, Vice President, Wilmington Trust
- 11:30 a.m.–12:40 p.m. **Lunch, President and Incoming President Messages, & CES® Address**
– Salons 1&2
- 12:40–12:50 p.m. Networking Break with Exhibitors – Roosevelt Promenade



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12:50–1:40 p.m. (50 min.)

Breakout A: Joke's On You, We're Still Alive: QOZs Haven't Killed Section 1031 Exchanges – Salons 3,4

Matthew Rappaport, Esq., LL.M., FALCON RAPPAPORT & BERKMAN PLLC

Breakout B: Oil & Gas Royalty Interests – Salon 5

Wolf Hanschen, Peregrine 1031 Energy Partners

1:40–2:00 p.m.

Networking Break with Exhibitors – *Roosevelt Prominade*

2:00–2:50 p.m. (50 min.)

General Session: The California Franchise Tax Board's View of Section 1031 - Salons 3,4,5

Ciro Immordino, Lead, General Tax Bureau

Patricia Carte, Program Manager

Blake Cunningham, Protest Hearing Officer

2:50–3:15 p.m.

Closing Comments & Prize Drawings – Salons 3,4,5