



FEDERATION
of EXCHANGE
ACCOMMODATORS

The Voice of the 1031 Industry

BIG IDEAS IN THE BIG EASY

**2019 ANNUAL
CONFERENCE
SEPTEMBER 11-13, 2019**

Zack Smith



Laissez les bon temps rouler!
(Let the good times roll!)

Join us at the FEA Annual Conference and experience the rich, unique culture of New Orleans! FEA gathers more than 200 QIs, attorneys, CPAs, banks, DSTs and other parties to network, grow professionally and learn the latest in the 1031 industry.

Bring the Krewe, order a Hurricane cocktail and join FEA for the must-attend conference for the 1031 industry!

SEPTEMBER 11-13, 2019

The Roosevelt New Orleans | New Orleans, LA 70112

2019 ANNUAL CONFERENCE

SEPTEMBER 11–13, 2019

HOTEL INFORMATION



THE ROOSEVELT NEW ORLEANS

130 Roosevelt Way

New Orleans, LA 70112

www.therooseveltneworleans.com

RESERVATIONS:

- Visit <https://tinyurl.com/FEA2019>
- Call (504) 335-3138 and reference FEA
- Early rate deadline: August 15, 2019

RATE:

- 1 King Deluxe or 1 or 2 Queen Deluxe \$214.00+
- 1 King Superior \$274.00+
- 2 Queen Superior \$274.00+
- Rooms include complementary basic WIFI

Please Note:

Booking a room in the FEA room block supports the 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.

SOCIAL EVENTS



The FEA Annual Conference is a great opportunity to connect with colleagues – old and new—over breakfast, breaks or during the organized optional activities:

- **Wednesday Reception**
Wednesday, September 11, 5:30–7:00 p.m. (Come hungry)
- **Mardi Gras World: Tour and Mask Making Activity**
Wednesday, September 11, 12:45–4:15 p.m.
- **Ghostly Spirits and Scandalous Tales Tour**
Wednesday, September 11, 7:15–9:30 p.m.
- **Thursday Reception featuring The Gumbo Trio**
Thursday, September 12, 5:30–6:30 p.m. (Light reception)

MARDI GRAS WORLD: TOUR AND MASK MAKING ACTIVITY

Get an insider's look at the magic of Mardi Gras by stepping into the studios of Blaine Kern and his team of world-renowned masters of float-building and Carnival! Marvel at towering floats, created by these skilled artists. The history and the craft are explained as guests enjoy the wonder of Mardi Gras World.

At the end of your tour, you'll make an original Mardi Gras mask. The mask making workshop starts with a brief history of masking in New Orleans. From there, you'll make your own, one-of-a-kind creation. The masks are fun to wear and make for a great keepsake!

Upon departing Mardi Gras World embark on a quick adventure through New Orleans Historic Garden District. Learn about the fascinating history and splendor of the Garden District of New Orleans with a narrated tour of this famed neighborhood.

FEATURES:

- Admission and tour of Mardi Gras World
- Hands on mask making activity
- Hurricane cocktail per person upon arrival

- Slice of King Cake per person
- Tour of New Orleans Garden District
- Deluxe roundtrip transportation
- ACCENT-DMC uniformed licensed guide

Wednesday, September 11, 2019, 12:45–4:15 p.m.

Cost: \$75.00 all-inclusive but consider bringing cash for the gift shop!

GHOSTLY SPIRITS AND SCANDALOUS TALES TOUR

New Orleans has a dark and juicy past that is delicious to discover. This Port City took up the roguish and sensual customs of both the Spanish and the French and then added on incredible local legends. The unforgettable cast of characters includes eccentric outlaws, pirates, saints, sinners and famous Voodoo Queens.

Kick off your tour via Mini Bus to pass one of New Orleans famous cities of the dead and hear the history of our unique burial customs.

Starting the stroll at Royal Street in the heart of the Quarter, great tidbits are tied to visual settings of where the action happened. The authentic history is replete with stories: Pirate Jean Lafitte becomes the warrior hero who helps defeat the British in the Battle of Orleans. Voodoo Queen Marie Laveau is a regular at the Catholic Mass and is an advisor to the genteel Creole power crowd. Governors and visitors consorted in the famous red light districts where pretty babies, great musicians and cocktail swingers made New Orleans famous for its ability to live it up (or down) and party. Seeing these scandal-filled special spots gives all an added appreciation of this City of a thousand stories of nights that never witness sleep.

Note: You cannot enter the cemeteries after 3pm. They are gated and locked overnight, since inhabitants are “dying” to get in..... muahhh!

INCLUDES:

- Narrated bus tour passing a New Orleans cemetery
- Narrated walking haunted tour of the French Quarter (*Lots of walking, where comfortable shoes and appropriate attire*)
- One (1) cocktail per person at Jean Lafitte's Blacksmith Shop
- Deluxe roundtrip transportation
- ACCENT-DMC uniformed licensed guide

Wednesday, September 11, 2019 7:15–9:30 p.m.

Cost: \$55.00 all inclusive

TRAVEL INFORMATION

All major airlines have service to Louis Armstrong New Orleans International Airport (MSY) with many direct flights arriving daily.

The Roosevelt New Orleans is just a short 20-minute drive from the airport, with car, cab and shuttle service readily available. You may contact The Roosevelt concierge team for transportation pricing and arrangements. (504) 648-1200 or see transportation options here: <http://www.flymsy.com/Transportation-Parking>

PARKING RATES

- Registered hotel guests – \$46 plus tax overnight
- Non-registered guests – \$23 for up to 8 hours
- Non-registered special event – \$25

Please note: The hotel has two entrances, one on Baronne Street and one on Roosevelt Way. Valet parking is only available from the Roosevelt Way entrance.

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 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.



1031s Build America

WEDNESDAY, SEPTEMBER 11, 2019

- 7:30 a.m. CES® Exam Registration
- 8:00–10:30 a.m. CES® Exam
- 8:00 a.m.–4:30 p.m. FEA Registration Desk Open
- 8:30 a.m.–12:00 p.m. **1031 Boot Camp**
(3.5hrs) *Hugh Pollard, CES®, Investment Property Exchange Services, Inc. - Reverse Division (IPX1031®)*
- 12:45–4:15 p.m. **Optional Activity: Mardi Gras World Tour and Mask Making**
- 1:30–4:30 p.m. **Reverse Exchanges: The Basics and Beyond**
(3hrs) *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 (Come hungry!)**
- 7:15–9:30 p.m. **Optional Activity: Ghostly Spirits and Scandalous Tales Tour**

THURSDAY, SEPTEMBER 12, 2019

- 7:00 a.m.–4:15 p.m. FEA Registration Desk Open
- 7:00 a.m.–3:25 p.m. Exhibits Open
- 7:00–8:00 a.m. FEA Networking Breakfast
- 8:00–8:30 a.m. **Welcome and Opening Remarks**
- 8:30–9:20 a.m. **General Session: Economic Update**
(50 min.) *Ted Jones, Chief Economist and Senior Vice President, Stewart Title Guaranty Company*

THURSDAY, SEPTEMBER 12, 2019 cont.

9:20–9:45 a.m. Networking Break with Exhibitors

9:45–10:35 a.m.
(50 min.)

General Session: Government Affairs Committee and The View from Washington

*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

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

1:00–1:50 p.m.
(50 min.)

General Session: Cyber Fraud – How to Protect Your Business

*Thomas Linehan, ESVP, BankUnited
Suzanne Goldstein Baker, Esq., CES®, Executive Vice President and General Counsel, Investment Property Exchange Services, Inc.*

1:50–2:20 p.m.

Networking Break with Exhibitors

2:20–3:10 p.m.
(50 min.)

Breakout A: Joke’s On You, We’re Still Alive: QOZs Haven’t Killed Section 1031 Exchanges

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

Breakout B: Oil & Gas Royalty Interests

Wolf Hanschen, Peregrine 1031 Energy Partners

3:10–3:25 p.m.

Break to change rooms back to a General Session, Visit with Exhibitors

3:25–4:15 p.m.
(50 min.)

General Session: Annual Tax Update

Mary B. Foster, CES®, President, 1031 Services, Inc.

5:30–6:30 p.m.

Networking Reception (Light reception, make dinner reservations/plans.)



FRIDAY, SEPTEMBER 13, 2019

- 7:30 a.m.–3:30 p.m. FEA Registration Desk Open
- 7:30 a.m.–3:10 p.m. Exhibits Open
- 7:30–8:30 a.m. FEA Breakfast and Committee Meetings
- 8:30–9:20 a.m. **General Session: Difficult, Tricky and Downright Thorny 1031 Situations**
(50 min.)
Moderator: Jeffrey R. Peterson, President, CPEC1031, LLC
Anne E. Andrews, Partner, PwC
Dan Cullen, Baker & McKenzie LLP
David Medinets, Madison Exchange Company
Robert D. Schachat, Ernst & Young, LLP
David Shechtman, Drinker Biddle & Reath, LLP
-
- 5-minute break to allow for speaker change
-
- 9:25–10:15 a.m. **General Session: Partnership Exchanges – Accommodating Divergent Interests**
(50 min.)
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
- 10:40–11:30 a.m. **General Session: Late Night with Ethics – An Irreverent Look at Ethical Issues Affecting Like-Kind Exchanges**
(50 min.)
David Gorenberg, JD, CES®, Vice President, Wilmington Trust
- 11:30 a.m.–12:40 p.m. **Lunch, President and Incoming President Messages, & CES® Address**
- 12:40–2:20 p.m. **Four Hot Topics (no, not Hot Pockets) in Rapid Succession**
(100 min.)
- **Disaster Relief**
Stephen A. Wayner, Esq., CES®, President, Liberty 1031, LLC
 - **Fidelity Bond Coverage**
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®)
- 2:20–2:40 p.m. Networking Break with Exhibitors
- 2:40–3:30 p.m. **General Session: The California Franchise Tax Board's View of Section 1031**
(50 min.)
Ciro Immordino, Lead, General Tax Bureau
Patricia Carte, Program Manager
Blake Cunningham, Protest Hearing Officer
- 3:30–3:40 p.m. **Closing Comments & Prize Drawings**

Schedule is subject to change.

Session descriptions and speaker biographies are found at www.1031.org.

FEA 2019 ANNUAL CONFERENCE

REGISTRATION GUIDE

Discounted pricing, as listed below, is available to registrants whose payment is received by end of day on Wednesday, August 28, 2019. The early bird rate will not be extended.

If paying by credit card, please purchase your registration online at www.1031.org.

CONFERENCE ATTENDEE REGISTRATION	By August 28	After August 28
M FEA Member <i>(1st person registering)</i>	\$895	\$995
MULTI Multi-Attendee Rate <i>(Additional person from same FEA member company)</i>	\$845	\$945
NM Non-FEA Member	\$1050	\$1150
FTM First Time Attendee FEA Member	\$695	\$795
FTNM First Time Attendee Non-FEA Member	\$795	\$895

BOOT CAMP REGISTRATIONS

BC 1031 Boot Camp <i>Wednesday from 8:30 a.m.–12:00 p.m.</i>	\$250	\$275
RBC 1031 Reverse Exchange Boot Camp <i>Wednesday from 1:00–3:00 p.m.</i>	\$250	\$275

OPTIONAL ACTIVITY REGISTRATIONS

MGW Mardi Gras World Tour and Mask Making <i>Wednesday from 12:45–4:15 p.m. (Same timeframe as Reverse Exchange Boot Camp)</i>	\$75	\$75
GST Ghostly Spirits and Scandalous Tales Tour <i>Wednesday from 7:15–9:30 p.m.</i>	\$55	\$55

GUEST RECEPTION TICKETS

Conference registration comes with reception tickets. Purchase if you are bringing a guest.

Guest Tickets for Wednesday heavy reception and Thursday light reception

WR Wednesday	\$100	\$125
TR Thursday	\$75	\$100

CANCELLATION/REFUND/ SUBSTITUTIONS:

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 Wednesday, August 28.

CONSENT TO USE OF PHOTOGRAPHIC IMAGES:

Registration and attendance at, or participation in, FEA meetings and other activities constitutes an agreement by the registrant to the use and distribution of the registrant or attendees' image or voice in photographs, videos, electronic reproductions and audiotapes of such events and activities by FEA and other third parties, including but not limited to the venue, the host city and the host CVB.



REGISTRATION FORM

If paying by credit card, register online at www.1031.org

(choose Events and Annual Conference). If paying by check, mail form with payment to FEA, 1255 SW Prairie Trail Parkway, Ankeny, Iowa 50023. Questions? Contact Denise Hoffman, CMP, 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
Dietary or Accommodation Needs _____

CIRCLE ONE PRICE

BEFORE AUGUST 28 / AFTER AUGUST 28

M: \$895 / \$995 **NM:** \$1050 / \$1150 **FTM:** \$695 / \$795

FTNM: \$795 / \$895

1031 BOOT CAMP AND REVERSE EXCHANGE BOOT CAMP *Optional*

CIRCLE ONE PRICE

BC: \$250 / \$275 **RBC:** \$250 / \$275 **BC&RBC:** \$500 / \$550

OPTIONAL ACTIVITIES

CIRCLE ONE PRICE **MGW:** \$75 **GST:** \$55 **MGW&GST:** \$130

GUEST RECEPTION TICKETS *Optional*

Conference registration comes with reception tickets.

Purchase if you are bringing a guest.

CIRCLE ONE PRICE

WR: \$100 / \$125 **TR:** \$75 / \$100 **WR&TR:** \$175 / \$225

Total Guests _____ Total Price _____

Guest(s) Name _____

Guest Dietary or Accommodation Needs (If more than one guest, list name and need for each guest) _____

ADDITIONAL ATTENDEE *(From Same Member Company Conference Registration)*

If more than two, please attach additional form(s)

Name _____
Company Name _____
Address _____
City/State/Zip _____
Phone _____
Email _____
Cell phone _____
for emergency purposes only
Dietary or Accommodation Needs _____

MEMBERS ONLY CIRCLE ONE PRICE

BEFORE AUGUST 28 / AFTER AUGUST 28

MULTI: \$845 / \$945

1031 BOOT CAMP AND REVERSE EXCHANGE BOOT CAMP *Optional*

CIRCLE ONE PRICE

BC: \$250 / \$275 **RBC:** \$250 / \$275 **BC&RBC:** \$500 / \$550

OPTIONAL ACTIVITIES

CIRCLE ONE PRICE **MGW:** \$75 **GST:** \$55 **MGW&GST:** \$130

GUEST RECEPTION TICKETS *Optional*

Conference registration comes with reception tickets.

Purchase if you are bringing a guest.

CIRCLE ONE PRICE

WR: \$100 / \$125 **TR:** \$75 / \$100 **WR&TR:** \$175 / \$225

Total Guests _____ Total Price _____

Guest(s) Name _____

Guest Dietary or Accommodation Needs (If more than one guest, list name and need for each guest) _____

ADDITIONAL ATTENDEE *(From Same Member Company Conference Registration)*

Name _____
Company Name _____
Address _____
City/State/Zip _____
Phone _____
Email _____
Cell phone _____
for emergency purposes only
Dietary or Accommodation Needs _____

MEMBERS ONLY CIRCLE ONE PRICE

BEFORE AUGUST 28 / AFTER AUGUST 28

MULTI: \$845 / \$945

1031 BOOT CAMP AND REVERSE EXCHANGE BOOT CAMP *Optional*

CIRCLE ONE PRICE

BC: \$250 / \$275 **RBC:** \$250 / \$275 **BC&RBC:** \$500 / \$550

OPTIONAL ACTIVITIES

CIRCLE ONE PRICE **MGW:** \$75 **GST:** \$55 **MGW&GST:** \$130

GUEST RECEPTION TICKETS *Optional*

Conference registration comes with reception tickets.

Purchase if you are bringing a guest.

CIRCLE ONE PRICE

WR: \$100 / \$125 **TR:** \$75 / \$100 **WR&TR:** \$175 / \$225

Total Guests _____ Total Price _____

Guest(s) Name _____

Guest Dietary or Accommodation Needs (If more than one guest, list name and need for each guest) _____

REGISTRATION TOTAL DUE

(add circled and totals from above) _____

Gold Sponsors and Reception Sponsors receive two (2) complementary registrations and a discounted \$650 registration fee for each additional representative. Silver Sponsors receive one (1) complementary registration and a discounted \$650 registration fee for each additional representative. If you are a Gold, Reception or Silver Sponsor, please adjust additional registration rate accordingly.

PAYMENT

Make check payable to FEA and mail to
1255 SW Prairie Trail Parkway, Ankeny, Iowa 50023
or register online at www.1031.org

_____ Check

If paying by credit card, please purchase your registration online at

www.1031.org



The Voice of the 1031 Industry

FEDERATION OF EXCHANGE
ACCOMMODATORS
1255 SW Prairie Trail Parkway
Ankeny, Iowa 50023
(515) 244-6515
www.1031.org
meetings@1031.org

PRSR STD
US POSTAGE
PAID
AMES, IA 50010
PERMIT NO. 14

2019 ANNUAL CONFERENCE SEPTEMBER 11-13, 2019

The Roosevelt New Orleans
New Orleans, LA 70112

B I G I D E A S I N T H E B I G E A S Y

Thank you to our
2019 ANNUAL CONFERENCE SPONSORS



*FEA is grateful to those who have committed to sponsoring the 2019 Annual Conference. Listing above includes paid sponsorships as of June 13, 2019. Once paid, sponsors will be listed in the electronic promotions and will receive full benefits as indicated with the sponsorship.

For more information about sponsorship, visit www.1031.org or email meetings@1031.org.