

State Bar of Michigan | 2016–2017

Article VIII §1, Bylaws of the State Bar of Michigan

Every Section and State Bar entity so directed by the Board of Commissioners or Representative Assembly shall annually make a written report containing a summary of its activities during the association year which shall be submitted to the Secretary on or before May 31. Annual reports may not exceed five 8 1/2" x 11" pages unless a waiver of this limitation is approved by the Executive Director.

Taxation Section

Chair

P58898 Alexander G. Domenicucci
Seyburn Kahn PC
2000 Town Ctr Ste 1500
Southfield MI 48075-1148
Phone: (248) 353-7620
Fax: (248) 353-3727
e-mail: adomenicucci@seyburn.com

Vice Chair

P57484 Carolee Kvoriak Smith, Jackson

Secretary

P59750 James H. Combs, Detroit

Treasurer

P68781 Jackie J. Cook, Jackson

Council Member

Term Ending: 2017

P67802 Mindi M. Johnson, Grand Rapids
P61138 Paul V. McCord, Lansing
P53947 Michael P. Monaghan, Clinton Township

Term Ending: 2018

P71691 William Charles Lentine, Bloomfield Hills
P51390 Andrew W. MacLeod, Detroit
P76865 Katherine Kaile Wilbur, Grand Rapids

Term Ending: 2019

P54846 Sean H. Cook, Southfield
P47237 Andrea D. Crumback, Grand Rapids
P61653 Joshua M. Wease, East Lansing

Commissioner Liaison

P70678 Shenique A. Moss, Detroit

Ex Officio

P57175 Michael M. Antovski, Detroit

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SECTION ANNUAL REPORT**

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Council Meeting Schedule:

Please attach any additional information needed regarding Council meetings as an addendum.

Meeting Type	Date	Location
Council meeting	6/28/16	Troy, MI
Council meeting, followed by Annual meeting	10/1/16	Troy, MI
Orientation for new members	10/11/16	Ann Arbor, MI
Council meeting	11/2/16	Southfield, MI
Council meeting	12/8/16	Southfield, MI
Meeting to update Policy & Procedure Manual	1/9/17	Lansing, MI
Council meeting	1/18/17	Detroit, MI
Council meeting	2/16/17	Lansing, MI
Council meeting	3/16/17	Southfield, MI
Meeting to update Policy & Procedure Manual	4/11/17	Lansing, MI
Council meeting	4/20/17	Southfield, MI

Addendum Information: Please list any addendums attached.

General budget information, section committees, annual tax conference, section legislative and policy, section awards, grant program, publications, social media, and future goals and activities

Events and/or Seminars:

Please attach any additional information needed regarding events and/or seminars as an addendum.

Event or Seminar Title	Date	Location
Presentation on state and local taxes in M&A	6/22/16	Detroit, MI
State & local tax mixer	9/14/16	Lansing, MI
Employee benefits mixer	10/27/16	Grand Rapids, MI
Trust & estates seminar	11/3/16	Detroit, MI
Presentation by Senator Levin on tax havens	1/18/17	Detroit, MI
Handle the New Partnership Tax Audit Procedures	1/24/17	Webcast
Joint Luncheon with the Michigan Tax Tribunal	1/31/17	East Lansing, MI
Estate Planning Tax Considerations for 2017	2/21/17	Webcast
Seminar on federal tax reform	3/9/17	Detroit, MI
Employee benefits mixer	3/16/17	Detroit, MI
Being a successful tax practitioner event	3/23/17	Detroit, MI
Tax Court luncheon with Judge Buch	3/30/17	Detroit, MI
Practice & procedure mixer	4/20/17	Detroit, MI

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Legislative issues:

See attached addendum for legislative activities in which the Taxation Section is involved

Recommendations for next Council:

See attached addendum for reference to Taxation Section's Strategic Plan

Other Information:

See attached addendum for further information regarding the Taxation Section

Reports must be submitted before May 31, 2016 to:

Jennifer Williams
Administrative Assistant
306 Townsend Street, Lansing MI 48933
Email: jwilliams@mail.michbar.org
Phone 517-367-6421 Fax: 517-482-6248

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e-mail form

**STATE BAR OF MICHIGAN
SECTION ANNUAL REPORT ADDENDUM**

SECTION MISSION STATEMENT: The purpose of the Taxation Section is to study the laws and procedures pertaining to the law of taxation and to promote the fair and just administration of local, state, and federal tax laws; to study and report upon proposed, necessary, or desirable legislation; to promote throughout the State of Michigan, the legal education of members of the bar and the public on the subject of taxation by sponsoring meetings, institutes, and conferences; to promote the Taxation Section through outreach programs.

GENERAL BUDGET INFORMATION: The Taxation Section's expenses continue to generally be in line with revenue. As a result, there are no immediate plans to raise membership dues.

SECTION COMMITTEES: The Taxation Section includes the following six committees:

1. **Federal Income Tax Committee**
2. **State and Local Tax Committee**
3. **Trusts and Estates Committee**
4. **Employee Benefits Committee**
5. **Practice and Procedure Committee**
6. **Young Tax Lawyers Committee**

The Committees (except for the Young Tax Lawyers Committee) monitor legislative, judicial and regulatory developments in their respective substantive areas of tax law. The Committees meet regularly to discuss areas of common concern and topics of interest in their respective practice areas. The Committees also conduct seminars and organize educational and networking events for their members.

The Young Tax Lawyers Committee is designed to promote an interest in the area of tax law among new attorneys, recent law school graduates, and law students. The Committee offers educational and networking events for its members.

Contact information for the chairperson of each Committee is available on the Taxation Section's website: <http://connect.michbar.org/tax/home>

ANNUAL TAX CONFERENCE: Each year, the Taxation Section holds its annual tax conference in May. The conference brings together national and local speakers on various topics in the area of tax. The conference is co-sponsored by ICLE. This year's tax conference represented the Taxation Section's 30th annual tax conference. The conference was held on May 25, 2017, at the Inn at St John's in Plymouth, Michigan.

SECTION LEGISLATIVE AND POLICY: On November 3, 2016, the Taxation Section Council adopted a policy statement in support of legislation that would improve the Michigan Tax Tribunal's process to promote the fair and just administration of state and local tax assessments. The Taxation Section Council recently adopted a resolution in favor of House Bill

4412, which would improve the operations of the Tax Tribunal. A representative of the Taxation Section Council testified before the House Tax Policy Committee in support of the bill.

SECTION AWARDS: The Taxation Section's L. Hart Wright Chair's Service Award is given in memory of Professor L. Hart Wright, State Bar of Michigan Taxation Chairperson (1965-1966). Each year, up to two recipients are selected by the outgoing Chairperson of the Taxation Section and presented with a plaque at the Taxation Section's Annual Meeting. At the Annual Meeting on October 6, 2016, the award was given by then outgoing Chairperson Michael M. Antovski to George W. Gregory of George W. Gregory, PLLC, in recognition of his exemplary service to the Taxation Section over the past year.

GRANT PROGRAM: The Taxation Section makes grants of up to \$5,000 to qualifying organizations that provide taxpayer assistance to low income individuals. Each year, grant recipients are recognized at the Taxation Section's annual tax conference. Grant recipients recognized at the tax conference on May 25, 2017, included (1) Alvin L. Storrs Low-Income Taxpayer Clinic, Michigan State University College of Law, (2) University of Michigan Low Income Taxpayer Clinic, and (3) Accounting Aid Society's Low Income Taxpayer Clinic.

PUBLICATIONS: The *Michigan Tax Lawyer* is published three times per year and sent to members via U.S. mail. The *Michigan Tax Lawyer* is also posted on the Taxation Section's website.

SOCIAL MEDIA: Members can follow the Taxation Section on Facebook and LinkedIn.

FUTURE GOALS AND ACTIVITIES: See the Taxation Section's Strategic Plan adopted January 18, 2017, which can be found on the section's website.