



**SPONSORS**  
Holland & Knight

**National Intertribal Tax Alliance**  
**18th Annual Tax Conference**  
**September 13th-15th, 2016**  
**Agua Caliente Casino Resort Spa**



**AGUA CALIENTE**  
**CASINO RESORT SPA**

**32-250 BOB HOPE DR, RANCHO MIRAGE, CA 92270**  
**(760) 321-2000**

**[HTTP://WWW.HOTWATERCASINO.COM/HOME](http://www.hotwatercasino.com/home)**



**National Intertribal Tax Alliance**

<http://www.intertribaltaxalliance.org>

For more information Email: [lanawhite@mhanation.com](mailto:lanawhite@mhanation.com)





# 18<sup>th</sup> Annual Tax Conference Overview and Welcome



The Board of Directors of the National Intertribal tax Alliance is pleased to announce its 18<sup>th</sup> Annual Tax conference on September 13-15, 2016 at the spectacular Agua Caliente Casino Resort Spa which is located in the city of Rancho Mirage, California. The facility has over 45,000 square feet of gambling floor. The casino completed a 16-story, 173-foot hotel tower which opened on April 18, 2008. The tower is the third-tallest building in the Inland Empire attracting golfers as well as family travelers due to the numerous courses, regional attractions, and expansive shopping center replete with a man-made river.

**Conference Overview** - This year's conference will provide a comprehensive understanding of major tribal tax issues including legislative and litigation updates with general sessions and breakouts for in-depth discussions on "hot topic" tribal tax matters in Indian County.

**Who should attend** – Tribal leaders, tribal members, tribal tax commissions, CFO's/ Treasurers, tribal business leaders, Indian law/tax attorneys, practitioners and professionals interested in current tribal tax issues will benefit from the two-day conference agenda. In addition to an informative agenda, NITA conferences allow for networking with other organizations and individuals dealing with important and complex tax issues.

If you have attended annual NITA Conferences in the past, welcome back and the board thanks you for your support and dedication to the mission and objectives of the National Intertribal Tax Alliance. If you are attending for the first time, we are sure you will truly benefit from the "NITA Conference experience," and we welcome you.

## 2016 NITA Board of Directors

**Mary Mashunkashey, Chairman Emeritus**  
**Kelly Croman, Chairperson** **Bruce Zimmerman, Treasurer**  
**Dale White** **Aubrey Seffernick**  
**Sharon Swepston** **Wendy Pearson** **Chad Yazzie**



*The Agua Caliente Indian Reservation was founded in 1896 and occupies 31,610 acres. The Tribe is historically known as "Agua Caliente No. 1." The Tribe's headquarters is located in Palm Springs, California. Their current **Tribal Council** is as follows:*

*Chairman: Jeff L. Grubbe      Vice Chairman: Larry Olinger      Treasurer: Vincent Gonzales III  
Member: Anthony Andreas III      Member: Reid Milanovich*

*We invite you to explore the website <http://www.aguacaliente.org> to learn about rich culture and traditions*

*Hotel reservations can be made in advance by visiting the Agua Caliente Casino Resort Spa at home or by calling the hotel desk directly at: 1-800-854-1279. Please be sure to indicate that you are attending the National Intertribal Tax Alliance (NITA) 2016 conference for the conference room rate of \$109.99/night.*

*For questions or additional information please, contact:*

**Lana White, Conference Planner 701-627-6119 Email: [lanawhite@mhanation.com](mailto:lanawhite@mhanation.com)**

# 18<sup>th</sup> Annual Tax Conference Sponsorship

## Conference Sponsorship

NITA is a 501(c) (4) non-profit organization incorporated under the Navajo Corporation Act. NITA is managed by an all-volunteer Board of Directors. The annual conference planning for the NITA conferences is supported mainly by registration fees and the well-appreciated support of our hosting tribe, conference sponsors and donors. The Board strives to keep the registration fees and costs low to ensure that Native organizations, tribes, tribal businesses, students and individuals are able to attend.

Recognition for your support will be acknowledged at the conference and included in the conference materials as well as the website, social media and publicity.

\_\_\_\_ Yes - Conference Sponsor supporting the National Intertribal Tax Alliance

\_\_\_\_ Gold Sponsor (\$3,000)      \_\_\_\_ Silver Sponsor (\$2,000)      \_\_\_\_ Bronze Sponsor (\$1,000)      \_\_\_\_ General Sponsor (Any Amount or In-kind Donation -see below)

Enclosed is my donation in the amount of \$\_\_\_\_\_ Sponsorship paid online

Preference for use of sponsorship or special instructions \_\_\_\_\_

*(Examples are Reception Sponsor, Lunch Sponsor, Break Sponsor, Conference Materials Sponsor)*

Name: \_\_\_\_\_

Organization/Tribe \_\_\_\_\_

Address \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

\_\_\_\_ I support NITA, but am unable to monetarily donate at this time. However I have expertise in the following that I can volunteer for:

\_\_\_\_ Website and/or Technical Assistance      \_\_\_\_ Media & Publicity      \_\_\_\_ Social Media  
\_\_\_\_ Fundraising/Grant Writing      \_\_\_\_ Graphic Design      \_\_\_\_ Conference Registration  
\_\_\_\_ Other \_\_\_\_\_

***Thank you for your support!***

Sponsorships/Donations may be made online via the NITA website: [www.intertribaltaxalliance.org](http://www.intertribaltaxalliance.org)  
Checks should be made payable to the National Intertribal Tax Alliance  
Lana White, Conference Coordinator, PO Box 1969, New Town ND 58753

*Volunteers*

Please contact Lana White Conference Coordinator  
Email: [lanawhite@intertribaltaxalliance.org](mailto:lanawhite@intertribaltaxalliance.org) Phone: 701-421-2852

# Registration and Hotel Information

**Hotel Accommodations/Reservations.** Agua Caliente Casino Resort Spa, Rancho Mirage 32-250 Bob Hope Drive, Rancho Mirage, CA, 92270, United States of America, 800-854-1279 using the **Group Name: 18<sup>th</sup> Annual National Intertribal Tax Alliance** for the group rate of **\$109.00/night 17% Occupancy Tax & WAIVED \$16.00 Resort Fee.** Reservations can be made online using group code: 160918ATC and must be booked prior to **August 23, 2016** to ensure availability. Advance reservations are encouraged for securing your room reservation. Information about the Agua Caliente Casino Resort Spa can be found at <http://www.hotwatercasino.com/casino>

**Airport Transportation.** Agua Caliente Casino Resort Spa is located approximately 6.5 miles from the Palm Springs International Airport. Individuals attending the conference will be responsible for airport transportation to and from the hotel by either rental car or airport shuttle services.

## Registration Form

NAME: \_\_\_\_\_ (Please submit a separate registration form for each individual registering)

POSITION/TITLE: \_\_\_\_\_

TRIBE/BUSINESS: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY: \_\_\_\_\_ STATE: \_\_\_\_\_ ZIP CODE: \_\_\_\_\_

PHONE: \_\_\_\_\_ E-MAIL: \_\_\_\_\_

\_\_\_\_\_ **Regular Registration**

(Register after July 22, 2016) @ \$425.00/ea

\$ \_\_\_\_\_

\_\_\_\_\_ **Student Registration @ \$200.00**

(please include copy of student ID)

\$ \_\_\_\_\_

### How to Register:

**1. Website Registrations:** [www.intertribaltaxalliance.org](http://www.intertribaltaxalliance.org) Electronic payment options available. Registration form may be filled in online.

**2. Mail-in Registrations:** Make checks payable to: **National Intertribal Tax Alliance.** Mail registration form and payment to: **Lana White, National Intertribal Tax Alliance, P.O. Box 1969 New Town, N.D 58763.** Confirmations will be made via email.

**Please note that all payments for registration are non-refundable.**

**Please contact: Lana White, Conference Coordinator** with questions or additional information: Email: [lanawhite@intertribaltaxalliance.org](mailto:lanawhite@intertribaltaxalliance.org) Phone: 701-421-2852

# Local Area Attractions

## PALM SPRINGS AERIAL Tramway



The Palm Springs Aerial Tramway  
<https://www.pstramway.com/>

Indian Canyons  
<http://www.indian-canyons.com/palm.html>

Village Fest – every Thursday evening  
<http://villagefest.org/>

Downtown Palm Springs  
<http://www.palmcanyondrive.org/>

Palm Springs Air Museum  
<http://palmspringsairmuseum.org/>



## Shuttle Companies

- AM/PM Shuttle Service - 760.409.8826
- At Your Service - 760.343.0666 or 888.700.7888
- First Class Shuttle Inc - 530.605.0137
- Lions School Shuttle Services, Inc. 714.606.4736
- Transit Van Shuttle - 951.719.3274
- R&C Express Shuttle - 760.567.2780
- Skycapp Shuttle - 760.870.5000



Win Energy Windmills  
<http://palmsprings.com/services/wind.html>

Desert Adventures  
<http://red-jeep.com/>

Celebrity Tours  
<http://www.palmspringsalive.com/>

Shopping/Restaurants – El Paseo in Palm Desert  
<http://www.elpaseocatalogue.com/elpaseo/>

Here's more helpful links  
<http://visitgreaterpalmsprings.com/>  
<http://www.visitpalmsprings.com/>

Palm Springs International Airport (PSP)

LA/Ontario International Airport (ONT)

Los Angeles International Airport (LAX)

John Wayne Airport (SNA)



# *18<sup>th</sup> Annual Tax Conference Speakers*

**Brenda Bellonger**, Tax Director, Sisseton Wahpeton Sioux Tribe

**Michelle Carr**, Attorney General, Sycuan Band of the Kumeyaay Nation

**Kelly Croman**, NITA Chair and General Counsel, Marine View Ventures, Inc.

**Leslie Cushman**, Senior Tax Counsel, Marine View Ventures, Inc.

**Honorable Chairman Mark Fox**, Three Affiliated Tribes, Mandan Hidatsa and Arikara

**Honorable Chairman Jeff Grubbe**, Agua Caliente Band of Indians

**Dan Hester**, Attorney, Hester & Zehren, LLC

**Christie Jacobs**, ITG Director, Internal Revenue Service

**Pearline Kirk**, Partner, Lewis Brisbois Brisgaard & Smith, LLP

**Stephen LeCuyer**, Staff Attorney, Swinomish Indian Tribal Community

**Vincent G. Logan**, Special Trustee for American Indians, Department of Interior

**Mary Mashunkashey**, Chair Emeritus and Executive Director Tax Three Affiliated Tribes

**James Meggesto**, Partner, Holland & Knight, LLP

**Catherine Munson**, Partner, Kilpatrick Townsend & Stockton, LLP

**Alicia Neely**, Tax Administrator, Swinomish Indian Tribal Community

**Kathleen Nilles**, Partner, Holland & Knight, LLP

**Wendy S. Pearson**, Of Counsel, Hobbs, Straus, Dean and Walker, LLP

**Rion Ramirez**, General Counsel, Port Madison Enterprises

**Nina Reece**, City Clerk/Administrative Director, QuilCeda Village, Tulalip Tribes

**Margaret Crow Rosenfeld**, Attorney, Forman and Associates

**Drew Ryce**, Attorney at Law

**Rob Roy Smith**, Partner, Kilpatrick Townsend & Stockton, LLP

**Jonathan Taylor**, President, Taylor Policy Group

**Michael C. Walch**, Attorney, Kirton McConkie

**Kevin Washburn**, Professor of Law, University of New Mexico School of Law

**Dale White**, General Counsel, Saint Regis Mohawk Tribe

**F. Michael Willis**, Partner, Hobbs, Straus, Dean and Walker, LLP

**Karen Woodard**, Realty Administrator, Morongo Band of Mission Indians

**Bruce Zimmerman**, Tax Director, Confederated Tribes of the Umatilla Reservation

# 18<sup>th</sup> Annual Tax Conference Agenda

## Pre-Conference Activities - Tuesday, September 13

5:30-6:30 pm Conference Pre-Registration

6:30-9:00 pm Welcome Reception

## Day 1 – Wednesday, September 14

7:30-8:00 am Registration and Continental Breakfast

8:00-8:30 am Welcome and Opening Remarks - **Mary Mashunkashey**, Chair Emeritus

**Honorable Chairman Jeff Grubbe**, Agua Caliente Band of Indians

**Honorable Chairman Mark Fox**, Three Affiliated Tribes, Mandan Hidatsa and Arikara

8:30-9:30 am

### KEYNOTE ADDRESS

**Speaker:** *Kevin Washburn*, Professor of Law, University of New Mexico School of Law

9:30-10:15 am

### General Session 1 – LITIGATION UPDATE

**Moderator:** **Bruce Zimmerman**, Tax Director, Confederated Tribes of the Umatilla Reservation

**Panelist:** *Catherine Munson*, Partner, Kilpatrick Townsend & Stockton, LLP

10:15-10:30am **BREAK**

10:30-11:45 am

### General Session 2– ENDING DUAL TAXATION – CASE STUDY OF THE IMPLEMENTATION OF THE GREAT WOLF LODGE CASE

**Moderator:** **Dale White**, General Counsel, Saint Regis Mohawk Tribe

**Panelists:** *Stephen LeCuyer*, Staff Attorney, Swinomish Indian Tribal Community; *Alicia Neely*, Tax Administrator, Swinomish Indian Tribal Community

11:45-1:00 pm

*Catered Lunch*

1:00-2:15 pm

**General Session 3 – TRUST MODERNIZATION: THE FUTURE OF BENEFICIARY SERVICES**

**Moderator:** **Mary Mashunkashey**, Chair Emeritus and Executive Director Tax Three Affiliated Tribes

**Panelists:** **Vincent G. Logan**, Special Trustee for American Indians, Department of Interior

2:15-3:15 pm

**General Session 4 – GENERAL WELFARE PLANNING AND OTHER METHODOLOGIES TO REDUCE TAXES ON TRIBAL MEMBERS**

**Moderator:** **Kelly Croman**, Chair

**Panelists:** **Christie Jacobs**, ITG Director, Internal Revenue Service; **Kathleen Nilles**, Partner, Holland & Knight, LLP; **Wendy S. Pearson**, Of Counsel, Hobbs, Straus, Dean and Walker, LLP

3:15-3:30 pm **BREAK**

3:30-5:00 pm

*Breakout Sessions Day 1 – A, B or C*

*Breakout Session A – TAX COMMISSION DEVELOPMENT & ADMINISTRATION*

**Moderator:** **Mary Mashunkashey**, Chair Emeritus

**Panelists:** **Brenda Bellonger**, Tax Director, Sisseton Wahpeton Sioux Tribe; **Nina Reece**, City Clerk/Administrative Director, QuilCeda Village, Tulalip Tribe

*Breakout Session B – RIGHT OF WAY LEASING ISSUES*

**Moderator:** **Bruce Zimmerman**, Tax Director, Confederated Tribes of the Umatilla Reservation

**Panelists:** **Karen Woodard**, Realty Administrator, Morongo Band of Mission Indians; **Dan Hester**, Attorney, Hester & Zehren, LLC

*Breakout Session C – CREATIVE USES FOR SECTION 17 CORPS*

**Moderator:** **Dale White**, General Counsel, Saint Regis Mohawk Tribe

**Panelists:** **Michael C. Walch**, Attorney, Kirton McConkie



5:00-6:00 pm

*Special Session – CALIFORNIA CIGARETTE TAXATION AND ENFORCEMENT*

This session will be in the same room as Breakout Session A, following the conclusion of that session.

6:00-8:00 pm Banquet Dinner Buffet/ Entertainment

## Day 2 – Thursday September 15

7:30-8:00 am Continental Breakfast

8:00-8:30 am Welcome – Kelly Croman, Chair

8:30-9:30 am

*General Session 5 – IRS & TREASURY UPDATE; TREASURY TRIBAL ADVISORY COMMITTEE UPDATE*

**Moderator:** Wendy S. Pearson, Of Counsel, Hobbs, Straus, Dean and Walker, LLP

**Panelists:** *Christie Jacobs*, ITG Director, Internal Revenue Service.

9:30-9:45 am **BREAK**

9:45-11:00 am

*General Session 6 – ESTABLISHING TRIBAL TAXATION TO PREEMPT STATE TAXATION*

**Moderator:** James Meggesto, Partner, Holland & Knight, LLP

**Panelists:** *Michelle Carr*, Attorney General, Sycuan Band of the Kumeyaay Nation; *Mary Mashunkashey*, Executive Tax Director Three Affiliated Tribes

11:00-12:00 pm

*General Session 7 – PROBLEMS OF DUAL TAXATION*

**Panelists:** *Jonathan Taylor*, President, Taylor Policy Group; *Kelly Croman*, NITA Chair and General Counsel, Marine View Ventures, Inc.

12:00-1:00 pm **LUNCH ON YOUR OWN**

1:00-2:00 pm

*General Session 8 – FEDERAL LEGISLATIVE AND REGULATORY UPDATE ON TRIBAL TAXATION MATTERS*

**Moderator:** Wendy S. Pearson, Of Counsel, Hobbs, Straus, Dean and Walker, LLP

**Panelists:** *F. Michael Willis*, Partner, Hobbs, Straus, Dean and Walker, LLP; Kathleen Nilles, Partner, Holland & Knight, LLP

**General Session 9 – CIGARETTE, TOBACCO AND MARIJUANA  
UPDATE**

2:00-3:15 pm

**Moderator:** Kelly Croman, Chair

**Panelists:** *Rion Ramirez*, General Counsel, Port Madison Enterprises

3:15-3:30 pm **BREAK**

3:30-4:30 pm

***Breakout Sessions Day 2 – D, E or F***

***Breakout Session D – CA BOE 1616***

**Moderator:** Dale White, General Counsel, Saint Regis Mohawk Tribe

**Panelists:** *Drew Ryce*, Attorney at Law; *Pearline Kirk*, Partner, Lewis Brisbois Brisgaard & Smith, LLP; *Margaret Crow Rosenfeld*, Attorney, Forman and Associates

***Breakout Session E – TAX EXEMPTIONS FOR TRIBES, TRIBAL  
BUSINESSES, AND TRIBAL CITIZENS***

**Moderator:** Kelly Croman, Chair

**Panelists:** *Leslie Cushman*, Senior Tax Counsel, Marine View Ventures, Inc.

***Breakout Session F – TAX CODE DEVELOPMENT AND  
ADMINISTRATION***

**Moderator:** Wendy Pearson, Of Counsel, Hobbs, Straus, Dean and Walker, LLP

**Panelists:** *Rob Roy Smith*, Partner, Kilpatrick Townsend & Stockton, LLP; *Alicia Neely*, Tax Administrator, Swinomish Indian Tribal Community;

4:30-5:00 pm **Closing Prayer –**

**Closing Remarks – NITA Board of Directors**

**Open Discussion on 19<sup>th</sup> Annual NITA Tax Conference Venue**

**Adjournment**

**Board of Directors Meeting**



***CLE Accreditation from California - Application Pending  
Certificates of Attendance Available for Submission to Conference Participants***

***Thank you for supporting the National Intertribal Tax Alliance!***

**Revised 8/25/16**