

18th 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 19th 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