

Seminars and Conferences

Avoiding the Pitfalls of State Residency Issues and State Tax Allocation Rules

Presented by Akerman
and WithumSmith+Brown

February 19, 2019
9:00 AM – 11:00 AM ET

WithumSmith+Brown
200 South Orange Avenue
Suite 1200
Orlando, FL

Akerman and WithumSmith+Brown will co-host a breakfast seminar titled, “Avoiding the Pitfalls of State Residency Issues and State Tax Allocation Rules.” The seminar will address federal tax reform, which has escalated the cost of being a “resident” in New York, Connecticut, New Jersey, California and Illinois, among other states. As residents consider moving out of these high tax jurisdictions into low tax jurisdictions such as Florida, Nevada, Texas, and others, some states, fearing a budget impact, have intensified their efforts to investigate the residency status of individuals and families that establish a primary residence in another state or that spend significant time in their state.

The speakers will include nationally-recognized Florida and New York lawyers as well as CPAs with local knowledge and experience in assisting individuals navigate the complex issues associated with the challenges of these residency issues.

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The seminar will address the following topics:

- Best Practices Regarding Residency Decisions and Actions
- Understanding the concepts of “Domicile,” “Statutory Residency,” and “Allocation of Income”
- How to Properly Prepare Personal Income Tax Returns Following a Change in Residency
- How to Prepare for a State Residency Audit
- How to Contest an Adverse Audit Finding
- Common Mistakes in Estate Planning Following a Change in Residency

Register

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