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**BNA**

# **2017 Tax & Accounting Calendar**



# Congratulations to our 2016 Tax Management Portfolio™ Author and Contributor Award Winners.

## Practitioner to Practitioner® There's no substitute for expertise

Bloomberg BNA has long recognized that the outstanding reputation we enjoy in the tax and accounting community is due in large part to the expert contributions of our *Tax Management Portfolio*™ authors and contributors. Our expert Portfolio authors and contributors, who include leading practitioners from key law firms, tax and accounting firms, and global corporations have deep expertise in their respective practice areas. Without them we wouldn't be able to offer the level of expert analysis that we do every single day, all year long.

## 2016 Bloomberg BNA Author Award Winners



### Estates, Gifts and Trusts

#### Estates, Gifts and Trusts Portfolio Author of the Year

**Richard W. Nenno, Esq.**  
Wilmington Trust Company

*Tax Management Portfolio*™, *State Income Taxation of Trusts*  
*Tax Management Portfolio*™, *Choosing a Domestic Jurisdiction*  
*for a Long-Term Trust*  
*Tax Management Portfolio*™, *Domestic Asset Protection Trusts*

#### Estates, Gifts and Trusts Contributor of the Year

**Christine L. Albright, Esq.**  
Holland & Knight LLP

"Looking Over the Past 30-Plus Years: Trends and Changes – Constantly Changing Landscape" was featured in Bloomberg BNA's *Estates, Gifts and Trusts Journal*



## Federal

### **Bloomberg BNA Leonard L. Silverstein Award for Distinguished Service in Tax**

**Samuel M. Maruca, Esq.**  
Covington & Burling LLP

Tax Management Portfolio™, *Transfer Pricing: The Code, the Regulations and Selected Case Law* Tax Management Portfolio™, *Transfer Pricing: OECD Transfer Pricing Guidelines*

### **Bloomberg BNA Federal Tax Portfolio Author of the Year**

**Andrew W. Needham, Esq.**  
Cravath, Swaine & Moore LLP

Tax Management Portfolio™, *Private Equity Funds* and *Portfolio 736, Hedge Funds*

### **Bloomberg BNA Federal Tax Contributor of the Year**

**Alden J. Bianchi, Esq.**  
Mintz, Levin, Cohn, Ferris, Glovsky and Popeo, P.C.

"Information Reporting Under the Affordable Care Act: I.R.C. §6055 and §6056" was featured in Bloomberg BNA's *Compensation Planning Journal*



## International

### **Bloomberg BNA Leonard L. Silverstein Award for Distinguished Service in International Tax**

**Jacques Malherbe**  
Liedekere Wolters Waelbroeck Kirkpatrick  
Tax Management Portfolio™, *Business Operations in Belgium*

### **International Tax Portfolio of the Year**

**Pascal Faes, Esq.**  
NautaDutilh  
Tax Management Country Portfolio™, *Business Operations in Belgium*  
Tax Management Country Portfolio™, *Business Operations in The European Union – Taxation*

### **International Tax Contributor of the Year**

**Guillermo Teijeiro**  
Teijeiro & Ballone  
Three-part article, "Opening Pandora's Box in the International Tax Field: New Trends" was featured in Bloomberg BNA's *International Tax News*

### **International Tax Contributor of the Year**

**Yuko Miyazaki**  
Nagashima, Ohno & Tsunematsu  
Contributions to the *Tax Management International Forum*

## State

### **Franklin C. Latham Award for Distinguished Service in State and Local Tax Law**

**Stephen M. Cordi**  
D.C. Office of Tax & Revenue

### **State Tax Author of the Year**

**Ray N. Stevens**  
Parker Poe Adams & Bernstein LLP  
Principal Author, *South Carolina Corporate Income Taxes*



# Todd Angkatavanich / David Stein

## Special Consultants to Bloomberg BNA Tax & Accounting

Co-Author, *Wealth Planning With Hedge Fund and Private Equity Fund Interests and Related IRC Section 2701 Issues*, Estates, Gifts and Trusts Portfolio

### Career Milestones

- Partner, Co-Head, Private Client & Tax Group; Withers Bergman LLP
- Member, American College of Trust and Estate Counsel (ACTEC)
- Member, Society of Trust and Estate Practitioners (STEP)
- Chair, Bloomberg BNA Tax Management Estate Tax Advisory Board

### Education

- LL.M. New York University School of Law, Taxation
- J.D. Rutgers University School of Law, Tax Law Honors, Campbell Scholar
- M.B.A. Rutgers Graduate School of Management  
Rutgers University School of Law, Tax Law Honors, Campbell Scholar
- B.A. Fairleigh Dickinson University, magna cum laude

Co-Author, *Wealth Planning With Hedge Fund and Private Equity Fund Interests and Related IRC Section 2701 Issues*, Estates, Gifts and Trusts Portfolio

### Career Milestones

- Partner, Withers Bergman LLP
- Former U.S. Wealth Planning Practice Group Leader, Withers Bergman LLP

### Education

- J.D. New York University School of Law, magna cum laude, Order of the Coif, Law Review
- B.A. Yale University, cum laude



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# January

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December

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February

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Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
New Year's Day  <b>1</b>	New Year's Day (Observed)  <b>2</b>	Form 730 (Nov. 2016) Form 2290 (Nov. 2016)  <b>3</b>	  <b>4</b>	EFTPS  <b>5</b>	EFTPS  <b>6</b>	  <b>7</b>
  <b>8</b>	51st Annual Heckerling Institute on Estate Planning  <b>9</b>	51st Annual Heckerling Institute on Estate Planning Form 4070 (Dec. 2016)  <b>10</b>	51st Annual Heckerling Institute on Estate Planning EFTPS  <b>11</b>	51st Annual Heckerling Institute on Estate Planning  <b>12</b>	51st Annual Heckerling Institute on Estate Planning EFTPS  <b>13</b>	  <b>14</b>
  <b>15</b>	Martin Luther King, Jr. Day  <b>16</b>	1040-ES (2016 #4); 1041-ES (2016 #4); 1040-ES (Farmers/Fishermen) EFTPS (Monthly/Nonpayroll)  <b>17</b>	  <b>18</b>	American Bar Association Section of Taxation Midyear Meeting EFTPS  <b>19</b>	Inauguration Day  American Bar Association Section of Taxation Midyear Meeting  <b>20</b>	American Bar Association Section of Taxation Midyear Meeting  <b>21</b>
  <b>22</b>	EFTPS  <b>23</b>	  <b>24</b>	EFTPS  <b>25</b>	  <b>26</b>	EFTPS  <b>27</b>	  <b>28</b>
  <b>29</b>	  <b>30</b>	Forms W-2/W-3 (2016) Forms 720 (Q4 2016), 730 (Dec. 2016), 2290 (Dec. 2016) Forms 940 (2016), 941 (Q4 2016), 943 (2016), 944 (2016), 945 (2016) Form 8809 To recipients (2016): 1095-B, 1095-C, 1097, 1098, 1099-MISC, 3921, 3922, 5498, W-2, W-2G, 8300 Form 1040 EFTPS (FUTA Dec. 2016)  <b>31</b>	<div>100 of the top 100 law firms use Bloomberg BNA</div>			

# Helen Marmoll

## Special Consultant to Bloomberg BNA Tax & Accounting

Author, *Employment Status – Employee v. Independent Contractor*, U.S. Income Portfolio

### Career Milestones

- Owner, Helen E. Marmoll Attorney-at-Law
- Tax Division, Trial Attorney, U.S. Department of Justice
- Member, American Bar Association
- Member, Virginia and Maryland State Bar Associations and District of Columbia Bar Association
- Member, American Judicature Society
- Member, Virginia Women Attorneys Association

### Education

- |      |  |
|------|--|
| J.D. | American University, Washington College of Law |
| A.B. | Marquette University                           |



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# February

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January

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March

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Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
			EFTPS		EFTPS	
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5	6	Bloomberg BNA Outlook on Tax	EFTPS		Form 4070 (Jan. 2017) Forms 940 (2016), 941 (Q4 2016), 943 (2016), 944 (2016), 945 (2016) EFTPS	11
			8	9	10	
12	13		2017 Form W-4 To recipients (2016): Forms 1099-B, 1099-S, 1099-MISC EFTPS EFTPS (Monthly/Nonpayroll)	Tax Council Policy Institute's 18th Annual Tax Policy & Practice Symposium (TCPI)	Tax Council Policy Institute's 18th Annual Tax Policy & Practice Symposium (TCPI) EFTPS	18
			15	16	17	
19	Presidents' Day TEI-Houston Chapter Annual Tax School	TEI-Houston Chapter Annual Tax School	TEI-Houston Chapter Annual Tax School 45th Annual Conference of the USA Branch of the International Fiscal Association	TEI-Houston Chapter Annual Tax School 45th Annual Conference of the USA Branch of the International Fiscal Association EFTPS	TEI-Houston Chapter Annual Tax School EFTPS	25
			22	23	24	
COST Sales Tax Conference & Audit Session	COST Sales Tax Conference & Audit Session	COST Sales Tax Conference & Audit Session 2016 Form 1096/W-2G (Copy A) 2016 Form W-2/W-3 2016 Forms 8027/8027-T Forms 730 (Jan. 2017), 2290 (Jan. 2017) Forms 1094-B, 1094-C, 1095-B, 1095-C, 1097, 1098, 1099, 3921, 3922, 5498	28	<p>"The Bloomberg BNA Federal Tax Guide is twice as thick, and 10 times as content rich as other quick reference tax guides that I have used over the past 40 years of professional accounting and tax practice."</p> <p>George Prytula, III, CPA, Professional LLC</p>		
26	27					



# Roy Crawford

## Special Consultant to Bloomberg BNA Tax & Accounting

Co-Author, *California Franchise and Corporation Income Taxes*,  
State Tax Portfolio

Co-Author, *California Sales and Use Taxes*, State Tax Portfolio

Co-Author, *Income Taxes: The Distinction Between Business  
and Nonbusiness Income*, State Tax Portfolio

### Career Milestones

- Counsel, McDermott Will & Emery LLP
- Former Chair of the State and Local Tax Committee of the ABA Tax Section
- Member, State Tax Advisory Board of Tax Management Multi-state Tax Portfolios
- Member, Board of Advisors, *Journal of Taxation and Regulation of Financial Institutions*
- Member, American Bar Association and the California State Bar Association

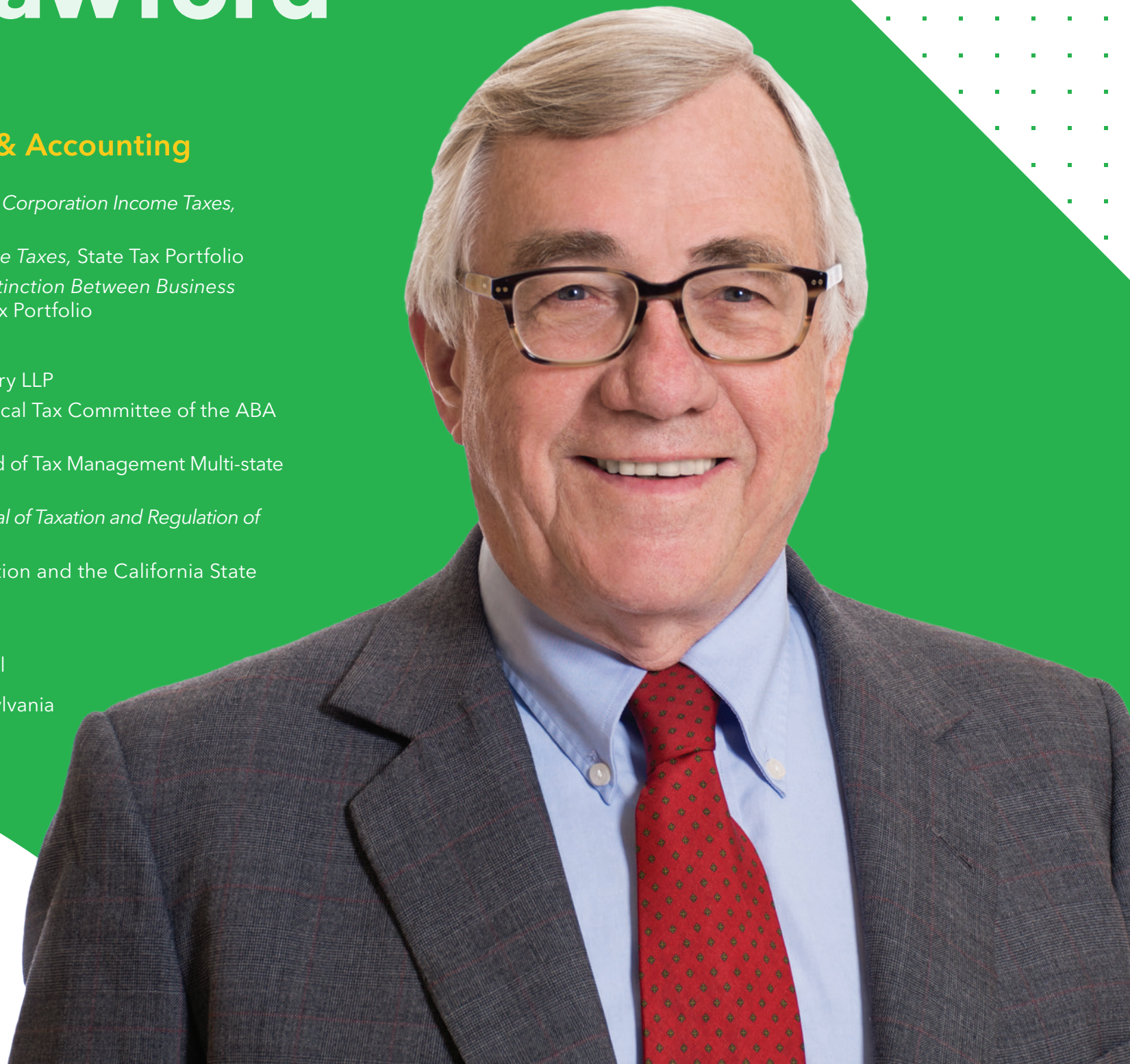
### Education

LL.B. Stanford Law School

B.S. University of Pennsylvania

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# March

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February

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April

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Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
<p>"The VAT Navigator is the ideal tool for anyone dealing with VAT. It is a perfect blend of deep analysis, expert opinions and latest developments."</p> <p><i>Mantas Juozaitis, Senior Associate, Motieka &amp; Audzeviciusa</i></p>			<p>COST Sales Tax Conference &amp; Audit Session 2016 Form 1040 (Farmers/Fishermen) EFTPS</p> <p>1</p>	<p>Forms 1095-B, 1095-C</p> <p>2</p>	<p>EFTPS</p> <p>3</p>	<p>4</p>
5	6	7	<p>EFTPS</p> <p>8</p>	9	<p>Form 4070 (Feb. 2017) EFTPS</p> <p>10</p>	11
12	13	14	<p>Forms 1042, 1042-S, 1042-T 1065, Sch. K-1 (1065), 1065-B, Sch. K-1 (1065-B), 1120S, Sch. K-1 (1120S) 2553, 7004 EFTPS EFTPS (Monthly/Nonpayroll)</p> <p>15</p>	16	<p>EFTPS</p> <p>17</p>	18
67th TEI Midyear Conference 19	67th TEI Midyear Conference 20	67th TEI Midyear Conference 21	<p>67th TEI Midyear Conference EFTPS</p> <p>22</p>	23	<p>EFTPS</p> <p>24</p>	25
26	27	28	<p>EFTPS</p> <p>29</p>	30	<p>Forms 730 (Feb. 2016) 2290 (Feb. 2016) E-file W-2G, 1097, 1098, 1099, 8027, 1094-B, 1095-B, 1094-C, 1095-C, 3921, 3922, 5498 2016 Forms 8027/8027-T EFTPS</p> <p>31</p>	<p>.</p> <p>.</p> <p>.</p> <p>.</p> <p>.</p> <p>.</p>



# Scott L. Semer

## Special Consultant to Bloomberg BNA Tax & Accounting

Co-Author, *Structuring Real Estate Joint Ventures with Private REITs*,  
U.S. Income Portfolio

### Career Milestones

- Partner, Torys LLP
- Partner, Davies Ward Phillips & Vineberg LLP
- Tax Associate, Davis Polk & Wardwell LLP
- Adjunct Professor at Columbia Law School
- Member, American Bar Association and New York State Bar Association

### Education

J.D.	Columbia University School of Law
B.F.A.	Tisch School of the Arts
Lecturer- in-Law	Columbia University School of Law



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# April

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March

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May

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Sunday

Monday

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Saturday

99 of the Fortune 100 corporations  
use Bloomberg BNA

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EFTPS

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EFTPS

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Form 4070 (Mar. 2017)

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EFTPS

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Thomas Jefferson's  
Birthday

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EFTPS

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Easter Sunday

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2016 Forms 1040, 1040A, 1040EZ,  
Sch. H (Form 1040), 1041, 4868  
1040-ES (2017 #1), 1041-ES  
(2017 #1) 1120, 7004, 1120-W (2017 #1)  
EFTPS (Monthly/Nonpayroll)  
FBAR-FinCEN Form 114

18

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EFTPS

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EFTPS

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COST 2016 Spring Audit  
Session/Income Tax  
Conference

COST 2016 Spring Audit  
Session/Income Tax  
Conference

COST 2016 Spring Audit  
Session/Income Tax  
Conference  
EFTPS

COST 2016 Spring Audit  
Session/Income Tax  
Conference

EFTPS

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# Carol Harrington

## Special Consultant to Bloomberg BNA Tax & Accounting

Author, *Generation-Skipping Transfer Tax*,  
Estates, Gifts and Trusts Portfolios

### Career Milestones

- Global Head, McDermott Will & Emery Private Client Practice
- Chicago Trusts & Estates Lawyer of the Year, 2015 and 2010
- Member, American Bar Association and Illinois Bar Association
- *The National Law Journal*, named one of the three most influential lawyers for Trusts & Estates 2011
- *Chambers USA*, 2006-2016, Wealth Management, Band 1
- Heckerling Institute on Estate Planning Advisory Board Member
- Chicago Estate Planning Council 2001 Distinguished Service Award

### Education

- |      |  |
|------|--|
| J.D. | University of Illinois College of Law      |
| B.S. | University of Illinois at Urbana-Champaign |

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# May

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April

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Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
• • • • •	TEI-Houston Chapter 29th Annual Tax School 720 (Q1 2017) 730 (Mar. 2017) 2290 (Mar. 2017) 941 (Q1 2017) EFTPS (FUTA Q1 2017)	TEI-Houston Chapter 29th Annual Tax School	TEI-Houston Chapter 29th Annual Tax School EFTPS	TEI-Houston Chapter 29th Annual Tax School	TEI-Houston Chapter 29th Annual Tax School EFTPS	
	1	2	3	4	5	6
7	8	9	Form 4070 (Apr. 2017) 941 (Q1 2017) EFTPS	American Bar Association Section of Taxation 2017 May Meeting	American Bar Association Section of Taxation 2017 May Meeting EFTPS	American Bar Association Section of Taxation 2017 May Meeting
14	2016 Forms 990, 990-EZ, 990-T, 990-PF, 8752, 8868 EFTPS (Monthly/Nonpayroll)	16	EFTPS	18	EFTPS	20
21	22	23	EFTPS	25	EFTPS	27
28	Memorial Day	30	Forms 730 (Apr. 2017), 2290 (Apr. 2017)	"When I need the best authoritative advice available for the tax questions I face, I go to the Bloomberg BNA Tax Management Portfolios™." Kevin J. Conner, Conner LLP		
	29		31			



# Patrick Marley

## Special Consultant to Bloomberg BNA Tax & Accounting

Co-Author, *Business Operations in Canada*, Country Portfolio

### Career Milestones

- Partner, Osler, Hoskin & Harcourt LLP
- Tax Policy Officer, Canadian Department of Finance
- Canadian Executive, International Fiscal Association
- Member, Canadian Tax Foundation, Ontario Bar Association, and American Bar Association International
- Member, NYU International Tax Program Practice Council

### Education

LL.M.	New York University
LL.B.	University of Western Ontario
B.Comm.	Queen's University

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# June

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May

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July

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# Lisa Starczewski

## Special Consultant to Bloomberg BNA Tax & Accounting

Author, *Partnerships - Allocation of Liabilities; Basis Rules*

Author, *At-Risk Rules*

Author, *Installment Sales*

Author, *Exclusion of Scholarships and Other Receipts for Education*

Author, *Deductibility of Legal and Other Professional Fees*

Author, *Noncorporate Alternative Minimum Tax*

Author, *IRS National Office Procedures - Rulings, Closing Agreements*

Author, *Corporate Alternative Minimum Tax*

Co-Author, *Real Estate Leases*

Co-Author, *The New Revenue Recognition Standard: Analysis & Application*

Co-Author, *Accounting for Leases: Fundamental Principles*

### Career Milestones

- Shareholder, Buchanan Ingersoll & Rooney PC
- Adjunct Professor, Villanova University School of Law
- Former Associate, Morgan, Lewis & Bockius
- Former Associate, Schnader, Harrison, Segal & Lewis

- Member, American Bar Association and Pennsylvania Bar Association
- Chair, Bloomberg BNA Advisory Board on Passthrough Taxation
- Chair, Advisory Board on Passthrough Taxation
- Recipient, Bloomberg BNA Distinguished Author Award

### Education

- J.D. Villanova University School of Law, summa cum laude
- B.A. Smith College, magna cum laude

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# July

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June

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August

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Sunday

Monday

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Saturday

97 of the top 100 accounting firms use Bloomberg BNA

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Form 11-C

Independence Day

EFTPS

EFTPS

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Form 4070 (Jun. 2017)

EFTPS

EFTPS

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EFTPS (Monthly/Nonpayroll)

EFTPS

EFTPS

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EFTPS

Georgetown Advanced State and Local Tax Institute

Georgetown Advanced State and Local Tax Institute

EFTPS

Form 941 (Q2 2017)  
Forms 5500, 5500-EZ, 5558, 720 (Q2 2017), 730 (Jun. 2017), 2290 (Jun. 2017)  
EFTPS  
EFTPS (FUTA Q2 2017)

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# Pascal Faes

## Special Consultant to Bloomberg BNA Tax & Accounting

Co-Author, *Business Operations in Belgium*,  
Country Portfolio

Author, *Business Operations in The European  
Union - Taxation*, Country Portfolio

### Career Milestones

- Partner, NautaDutilh
- Partner, Van Bael & Bellis
- Senior Tax Manager, Price WaterhouseCoopers
- Member, International Fiscal Association
- Member, Tax Section of the American Bar Association
- Member, Bloomberg BNA Tax Management  
International Forum

### Education

Master in Tax Law	University of Brussels
Special Degree, Business Economics	University of Brussels
J.D.	University of Ghent

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# August

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July

September

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# Daniel S. Rubin

## Special Consultant to Bloomberg BNA Tax & Accounting

Co-Author, *Asset Protection Planning*, Estates, Gifts and Trusts Portfolios

### Career Milestones

- Partner, Moses & Singer LLP
- Fellow, The American College of Trust and Estate Counsel
- Adjunct Professor, University of Miami School of Law
- Past-President, New York City Estate Planning Council

### Education

LL.M.	Taxation, New York University School of Law
J.D.	Brooklyn Law School
B.A.	George Washington University



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# September

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## August

October

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Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
<p>"I really like the Financial Accounting Resource Center. The setup is very clean and it's easy to navigate. It also includes additional accounting guidance in many areas that I find very useful. It will definitely save us a lot of time."</p> <p>John Vaillancourt, CPA, Global Controller, Charles River Development</p>					<p>71st Congress of the International Fiscal Association (IFA)</p> EFTPS <p>1</p>	<p>2</p>
	Labor Day			EFTPS	EFTPS	
3	4	5	6	7	8	9
10	Form 4070 (Aug. 2017)	12	EFTPS 13	14	Form 1040-ES (2017 #3) Forms 1120S, 1120-W (2017 #3) 1065, 1065-B EFTPS EFTPS (Monthly/Nonpayroll) Form 1120 15	16
17	18	19	EFTPS 20	21	EFTPS 22	23
24	25	26	EFTPS 27	28	EFTPS 29	30

# Bruce P. Ely

## Special Consultant to Bloomberg BNA Tax & Accounting

Author, *Choice of Entity: An Overview of Tax and Non-Tax Considerations*, State Tax Portfolio

### Career Milestones

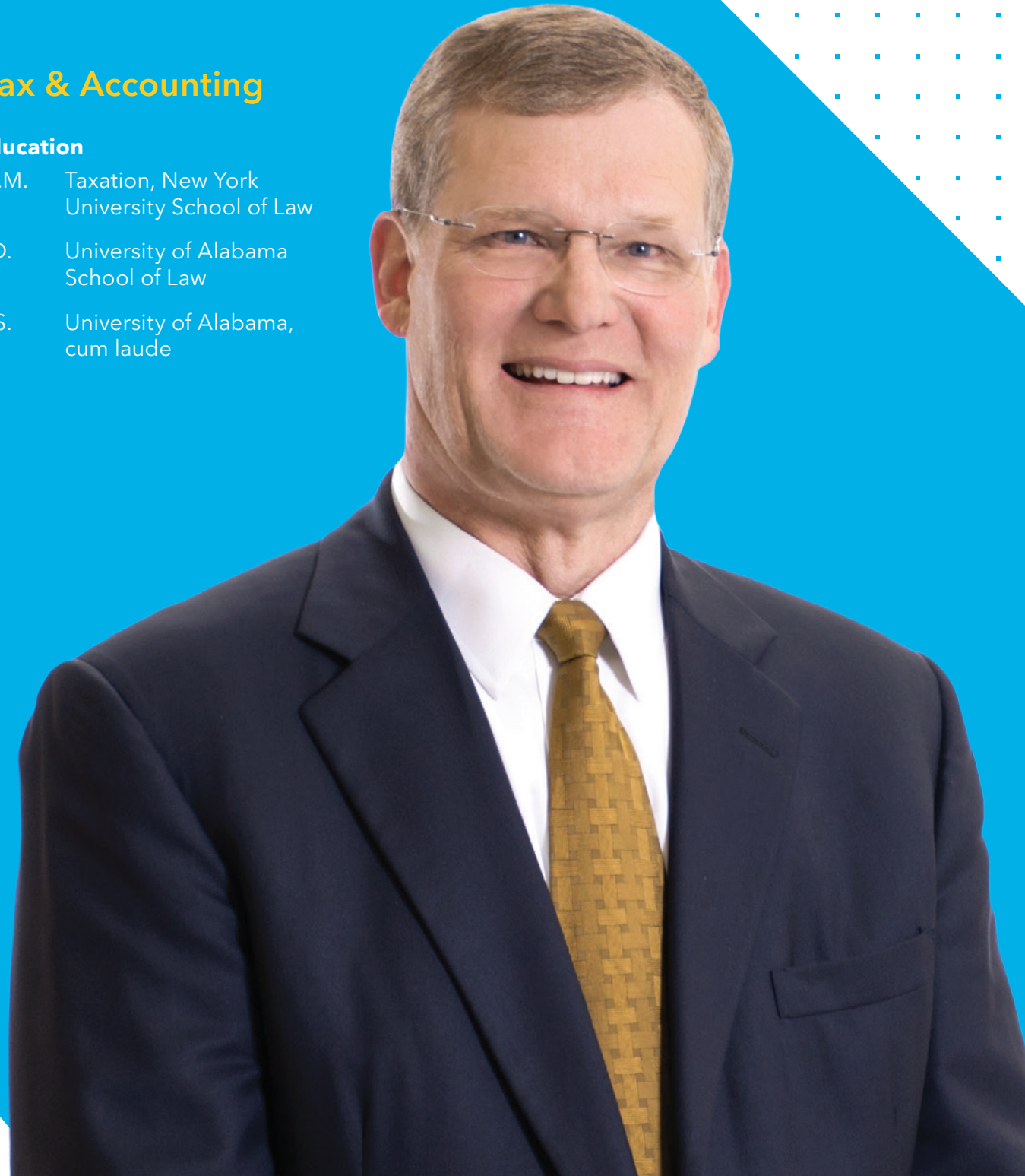
- Partner, Bradley Arant Boult Cummings LLP
- State and Local Tax Adviser, Alabama Society of CPAs
- State and Local Tax Adviser, American Institute of CPAs
- Co-Chair, NYU Institute on State & Local Taxation
- Fellow, American College of Tax Counsel
- Member, Bloomberg BNA Multistate Tax Advisory Board
- Member, ABA Section of Taxation
- Member and Former Chair, Alabama Bar Association Tax Section
- Recipient, NYU's Paul H. Frankel Award for Outstanding Achievement in State and Local Taxation
- Adjunct Professor, University of Alabama Culverhouse School of Accountancy Graduate Program
- Vice-Chair, Public Affairs Research Council of Alabama (PARCA)
- Named The Best Lawyers in America®
- *State Tax Notes*, named Top 10 Tax Lawyers in the United States

### Education

- LL.M. Taxation, New York University School of Law
- J.D. University of Alabama School of Law
- B.S. University of Alabama, cum laude

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# October

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September

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November

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26	27	28	29	30		

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
<b>ABA Taxation Joint Fall Meeting</b>  <b>1</b>	<b>Form 1041</b> <b>Form 730 (Aug. 2017),</b> <b>Form 2290 (Aug. 2017)</b>  <b>2</b>	<b>3</b>	<b>EFTPS</b>  <b>4</b>	<b>5</b>	<b>EFTPS</b>  <b>6</b>	<b>7</b>
<b>8</b>	Columbus Day (Most regions)  <b>9</b>	<b>Form 4070 (Sept. 2017)</b>  <b>10</b>	<b>11</b>	<b>EFTPS</b>  <b>12</b>	<b>EFTPS</b>  <b>13</b>	<b>14</b>
<b>15</b>	<b>Forms 1040, 1040A, 1040-EZ,</b> <b>1040-NR</b> <b>FBAR - FinCEN Form 114</b> <b>EFTPS (Monthly/Nonpayroll)</b>  <b>16</b>	<b>17</b>	<b>EFTPS</b>  <b>18</b>	<b>19</b>	<b>EFTPS</b>  <b>20</b>	<b>21</b>
<b>Council on State Taxation</b> <b>Annual Meeting</b> <b>TEI (Tax Executive's Institute)</b> <b>71st Annual Conference</b>  <b>22</b>	<b>Council on State Taxation</b> <b>Annual Meeting</b> <b>TEI (Tax Executive's Institute)</b> <b>71st Annual Conference</b>  <b>23</b>	<b>Council on State Taxation</b> <b>Annual Meeting</b> <b>TEI (Tax Executive's Institute)</b> <b>71st Annual Conference</b>  <b>24</b>	<b>Council on State Taxation</b> <b>Annual Meeting</b> <b>TEI (Tax Executive's Institute)</b> <b>71st Annual Conference</b> <b>EFTPS</b>  <b>25</b>	<b>26</b>	<b>EFTPS</b>  <b>27</b>	<b>28</b>
<b>29</b>	<b>30</b>	<b>Forms 720 (Q3 2017),</b> <b>730 (Sep. 2017),</b> <b>2290 (Sep. 2017)</b> <b>941 (Q3 2017)</b> <b>EFTPS (FUTA Q3 2017)</b>  <b>31</b>	<div> <p>“The Bloomberg BNA Portfolio Series is extremely helpful for the busy tax professional. The service provides value to people who have to deliver consulting advice quickly and accurately.”</p> <p><i>Stephen J. McGuar, Chief Tax Officer, HIS, Inc.</i></p> </div>			

# Craig Wilkey

## Special Consultant to Bloomberg BNA Tax & Accounting

Co-Author, *Life Insurance – A Practical Guide for Evaluating Policies, Estates, Gifts and Trusts Portfolios*

### Career Milestones

- Managing Director, Seawall Financial
- Senior Manager, Insurance Consulting Services, Deloitte & Touche
- Assistant Vice President MetLife Financial Services

### Education

M.B.A.      Northeastern University  
B.A.      Tufts University

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# November

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October						
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

December						
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
30						

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
<p>"When I need to understand a topic in even greater detail, the <i>Tax Management Portfolios</i>™ give me real-world examples of things to consider."</p> <p><i>Dan Neale, Partner, Edide Bailly</i></p>			EFTPS		EFTPS	
			1	2	3	4
5	6	7	EFTPS			Veterans Day
			8	9	10	11
12	Current Financial Reporting Issues (CFRI) Annual Conference Form 941 (Q3 2017) Form 4070 (Oct. 2017) EFTPS	Current Financial Reporting Issues (CFRI) Annual Conference	Forms 990 EFTPS EFTPS (Monthly/Nonpayroll)		EFTPS	
	13	14	15	16	17	18
19	20	21	EFTPS	Thanksgiving Day		
			22	23	24	25
26	EFTPS	28	EFTPS	Form 730 (Oct. 2017) Form 2290 (Oct. 2017)	.	
	27		29	30	.	
					.	
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# Steven Schindler

## Special Consultant to Bloomberg BNA Tax & Accounting

Co-Author, *Ethical Rules for Estate Planning Lawyers – Conflicts, Confidentiality, and Other Issues*, Estates, Gifts and Trusts Portfolios

### Career Milestones

- Partner, Perkins Coie LLP
- Member, American Bar Association and Washington, Texas and Arizona State Bar Associations
- Executive Committee, Estate Planning Council of Seattle

### Education

J.D.	Duke Law School, magna cum laude
M.P.P.	Duke University
B.A.	Southern Methodist University
B.S.	Southern Methodist University, summa cum laude



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# December

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November

			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

January

	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
<div>"The Bloomberg BNA Tax Management Portfolios™ are a reliable source for all our tax needs. Their experts are the best at what they do."</div> <div>Odelee Wint, Tax Manager, Olympus Corporation of the Americas</div>					EFTPS	
3	4	5	EFTPS	6	7	8
10	Form 4070 (Nov. 2017)	12	EFTPS	14	1120-W (2017 #4) EFTPS EFTPS (Monthly/Nonpayroll)	16
17	18	19	EFTPS	20	21	22
Christmas Eve 24	Christmas			EFTPS	EFTPS	
New Year's Eve 31	25	26	27	28	29	30



**Todd Angkatavanich**  
**David Stein**



**Helen Marmoll**



**Roy Crawford**



**Scott Semer**



**Carol Harrington**



**Patrick Marley**



**Lisa Starczewski**



**Pascal Faes**



**Daniel Rubin**



**Bruce Ely**



**Craig Wilkey**



**Steven J. Schindler**