



PREPARATION AND TRIAL SEMINAR OF THE PROPERTY TAX APPEAL

BEFORE YOU GO TO COURT... GET THE INSIDE TRACK!



IAAO

INTERNATIONAL ASSOCIATION
of ASSESSING OFFICERS

Valuing the World

JUNE 18 – 19, 2020

*Drake University Law School
Des Moines, Iowa*

Register for this event at www.iaao.org/prepandtrial2020
or contact **Rachel Mense** (mense@iaao.org) at **816-701-8109**

SEMINAR OVERVIEW

The Legal Conference Task Force is presenting this two-day training for attorneys, assessors, and appraisal personnel who want to be better prepared for appeals. The topics will focus on trial ethics, depositions and preparing for the mega assessment cases, review appraisers and rebuttal witnesses, and the trial mechanics. Besides the mock trial, attendees will also hear experts speak, participate in deliberations, and hear panel discussions from various viewpoints. The subject property of the mock trial is a case involving a big-box store.

SCHEDULE

DAY 1 • THURSDAY, JUNE 18

OVERVIEW OF CIVIL TRIAL PRACTICE

8:00-8:15 am

Opening Remarks

8:15 – 9:45 am

Preparing the Assessor's Office
for Litigation / Negotiating

N. Joel Moser, Esq., Portland, ME

9:45 – 10:30 am

A Successful Defense Starts
with a Fair Assessment

Thomas A. Jaconetty, Esq., FIAAO, Chicago, IL

10:30 – 10:45 am Break

10:45 am – 12:15 pm

Depositions and Discovery

John A. Zelinka, Esq., Memphis, TN
Jason B. Wittgraf, Esq., Des Moines, IA

12:15 – 1:15 pm

Lunch provided at Drake Law School

PREPARATION FOR TRIAL

1:15 – 2:15 pm

Technology used at the Trial

Tim Wilmath, MAI, West Palm Beach, FL

2:15 – 3:15 pm

Analyzing the Appraisal Report

Kenneth W. Voss, CAE, MAI, Atlanta, GA

3:15 – 3:30 pm Break

3:30 – 4:30 pm

Legal Research

TBD

DAY 2 • FRIDAY, JUNE 19

MOCK TRIAL

8:00 – 9:00 am

Witness Examination and Cross Examination

William D. Shepherd, Esq., Tampa, FL

9:00 – 10:30 am

Taxpayer's Presentation

Robert Grimaldi, Esq., Orlando, FL

10:30 – 10:45 am Break

10:45 – 12:15 am

Taxing Jurisdiction's Presentation

William D. Shepherd, Esq., Tampa, FL
Peter F. Korpacz, MAI, CRE, FRICS, Mount Airy, MD

12:15 – 1:15 pm

Lunch provided at Drake Law School

ISSUES RELATED TO AD VALOREM TAX LITIGATION

1:15 – 2:15 pm

Debrief on Trial Strategy

William D. Shepherd, Esq., Tampa, FL

2:15 – 2:30 pm Break

2:30 – 3:30 pm

Ethics including Federal Rule of Civil Procedure 11

Roger Kuhle, Esq., Des Moines, IA

3:30 – 4:15 pm

Judicial Perspective on the Trial

TBD

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REGISTRATION FEES:

Registration includes materials, breaks and lunches. The early registration deadline is May 1. Online registration will close June 5. After this deadline you must register onsite.

Registrations received before May 1:

- **IAAO Member:** \$500
- **Non-member:** \$625

Registrations received after May 1 or on-site:

- **IAAO Member:** \$550
- **Non-member:** \$700

If seeking Continuing Legal Education credit, you must register by April 17, 2020.

CONFIRMATION:

All registrants will receive written confirmation/receipt of registration via email from IAAO.

REFUND AND CANCELLATION POLICY:

At the current time IAAO is continuing to plan for the Prep & Trial Seminar to take place as scheduled. If IAAO cancels the seminar due to Coronavirus travel and meeting restrictions, a full registration refund will be issued to each attendee. IAAO is continuously monitoring the situation, and will communicate any pertinent information if the meeting status changes. If the meeting is held as planned, requests for refunds received in writing by May 17, 2020 will be honored, less a \$50 processing fee. **No refunds are given for no-shows.**

Send your cancellation notice to:

Rachel Mense

e-mail: mense@iaao.org,

Mail: IAAO, 314 W. 10th St., Kansas City, MO 64105

Fax: 816-701-8169.

By registering for this event, you agree to abide by the refund and cancellation policy.



Conference Site

The **Preparation and Trial of the Property Tax Appeal Seminar** will be held at Drake University Law School 2507 University Ave, Des Moines, IA 50311. The Seminar will be located in Cartwright Hall on the Law School campus at 2621 Carpenter Avenue.

Drake University's 150-acre campus is located in Des Moines, Iowa's state capital and a city offering attractions including restaurants and shopping; music festivals, museums, and other cultural highlights; and excellent internships. Des Moines has been ranked No. 1 on Forbes magazine's list of the "Best Places for Business and Careers." Drake offers undergraduate and graduate programs, including professional programs in business, law, and pharmacy. Drake's law school is among the 25 oldest in the country.

Conference Hotel and Room Reservations

AC Hotel Des Moines East Village

401 East Grand Avenue
Des Moines, Iowa 50309

Room rate begins is \$169 plus tax, single/double. Please note that the special IAAO rate is offered on a space available basis, until Sunday, May 17.

For hotel reservations call 515-518-6060 or visit <https://www.marriott.com/event-reservations/reservation-link.mi?id=1580336587623&key=GRP&app=resvlink>. The AC Hotel is a part of the Marriott family.

Climate

June daytime highs average 82° F and nightly lows average 62° F.

Transportation

Des Moines is located in central Iowa. Two major Interstates (I-35 and I-80) pass through the metropolitan area. The Des Moines International Airport (DSM) is within six miles of Drake University. DSM is served by six different airlines and has 90 domestic flights a day and 25 direct flight destinations. Airport shuttle service is available from the seminar hotel. Transportation will also be available from the hotel to the seminar site at Drake University.

Attorneys may be eligible to receive CLE credit through reciprocity or through self-submission in some states. For more information, email library@iaao.org.

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IAAO'S LEGAL CONFERENCE TASK FORCE

IAAO's Legal Conference Task Force supports the mission and commitments of IAAO by offering the unique perspectives of members who are primarily involved or interested in legal issues. The Legal Conference Task Force organizes the annual Legal Seminar and the Preparation and Trial of the Property Tax Assessment Appeal Seminar. Interested IAAO members are welcome to participate in the activities of the task force.

RECERTIFICATION CREDIT

IAAO professional designees will earn 13 hours of recertification credit. If you are participating in other recertification and continuing education programs, please bring the forms or letters to the seminar. We cannot guarantee that the credits will be honored by other entities. Anyone seeking continuing education credit will need to submit their request as an individual.

CONTINUING LEGAL EDUCATION CREDIT

IAAO can apply for CLE accreditation for attendees seeking CLE credits for attendance at the Prep & Trial Seminar. Indicate state(s) and attorney registration number when registering. Other than Continuing Legal Education (CLE), IAAO will not be submitting requests for continuing education to individual states. Attorneys will receive a uniform certificate of attendance on the second day of the seminar for filing with their state. IAAO will seek approval for states that are requested prior to the April 17 deadline. IAAO cannot guarantee that states will approve the seminar for CLE accreditation.



IAAO

INTERNATIONAL ASSOCIATION
of **ASSESSING OFFICERS**

Valuing the World

The International Association of Assessing Officers (IAAO), established in 1934, is one of the world's largest and most comprehensive associations for assessment professionals. The IAAO mission is to promote innovation and excellence in property appraisal and property tax policy and administration through professional development, education, research, and technical assistance. IAAO members abide by a strict code of ethics to ensure public trust, and the association is a founding member of The Appraisal Foundation.

IAAO welcomes students and members of any sex, age, race, color, nationality, or ethnic origin in the administration of its policies. IAAO complies with the Americans with Disabilities Act.

IAAO membership information is available from IAAO headquarters. Call the Membership Department at 816-701-8100, email membership@iaao.org, or visit iaao.org.

The statements made or views expressed by speakers at this seminar do not necessarily represent a policy position of the International Association of Assessing Officers.

International Association of Assessing Officers

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