



University of North Carolina - School of Government

PREPARATION & TRIAL SEMINAR

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



IAAO

INTERNATIONAL ASSOCIATION
of ASSESSING OFFICERS

Valuing the World

JUNE 7 – 8, 2018

*Chapel Hill School of Government,
University of North Carolina
Chapel Hill, North Carolina*

Register for this event at www.iaao.org/prepandtrial2018
or contact **Rachel Mense** (mense@iaao.org) at **816-701-8109**

PREPARATION AND TRIAL SEMINAR OVERVIEW

The Legal Committee is presenting this 2-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 the mega assessment case, review appraisers and rebuttal witnesses, and 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 hotel.

SCHEDULE

DAY 1 • THURSDAY, JUNE 7

OVERVIEW OF CIVIL TRIAL PRACTICE

8:00-8:15 am

Opening Remarks

8:15 – 9:15 am

Preparing the Assessor's Office for Litigation

Elizabeth White, City of Norfolk, VA

9:15 – 10:15 am

Trial Ethics

Christopher B. McLaughlin, Esq., Chapel Hill, NC

10:15 – 10:30 am Break

10:30 am – Noon

Depositions

George Brown, Esq., Boise, ID

12:00 – 1:30 pm

Luncheon provided at the UNC School of Government

THE MOCK TRIAL BEGINS

1:30 – 1:45 pm

Preliminary Matters for the Tribunal

William W. Peaslee, Esq.

1:45 – 3:00 pm

Presentation of Taxpayer's Case in Chief & Witness Examination

C. B. McLean, Jr., Esq., Raleigh, NC
Kirk F. Boone, PPS, Chapel Hill, NC

3:00 – 3:15 pm Break

3:15 – 4:30 pm

Presentation of Taxing Body's Case in Chief & Witness Examination

Katherine Ross, Esq., Raleigh, NC
Doug Huffman, Raleigh, NC

DAY 2 • FRIDAY, JUNE 8

MOCK TRIAL CONTINUES

8:00 – 9:00 am

Taxpayer's Rebuttal

9:00 – 10:00 am

Taxing Jurisdiction's Rebuttal

10:00 – 10:15 am Break

10:15 – 10:45 am

Closing Arguments by Both Parties
(15 minutes each)

10:45 – 11:45 am

Panel discussion on Witness Examination and Cross-Examination
Thomas A. Jaconetty, Esq., Chicago, IL
Matt Landwehr, Esq., St. Louis, MO

11:45 am – 1:00 pm

Luncheon provided at the UNC School of Government

ISSUES RELATED TO AD VALOREM TAX LITIGATION

1:00 – 3:00 pm

Preparing the Mega Assessment Case
N. Joel Moser, Esq., Portland, ME

3:00 – 3:15 pm Break

3:15 – 3:45 pm

Audience Deliberation and Decision Reports
Facilitator: Stephen W. Pelfrey, Esq., Durham, NC

3:45 – 4:30 pm

Judicial Perspective on the Trial
William W. Peaslee, Esq.

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REGISTRATION FEES:

Registration Includes materials, continental breakfasts, and lunches.

Registrations received before April 21:

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

Registrations received after April 21 and on-site:

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

If seeking Continuing Legal Education credit, you must register by April 2, 2018.

CONFIRMATION:

All registrants will receive written confirmation/receipt of registration via e-mail from IAAO.

REFUND AND CANCELLATION POLICY:

Guarantees for food service, printing, and space rental cannot be changed by IAAO at the last moment. For this reason we must adhere to strict guidelines. Requests for refunds will be honored, less a \$50 processing fee, only if received in writing by May 7, 2018. No refunds will be made after May 7, 2018. **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 the University of North Carolina – School of Government, 400 South Road, Chapel Hill, NC 27514.

The UNC School of Government is located in the Knapp-Sanders Building on the campus of the University of North Carolina at Chapel Hill. Nestled in the rolling hills of the Piedmont, Chapel Hill is only minutes away from the renowned Research Triangle Park, North Carolina State University, and Duke University as well as the beautiful Carolina Inn. A historically renowned haven, Carolina Inn is the only hotel on the UNC Chapel Hill campus, and guests are a short walk from all university destinations and historic Franklin Street.

Conference Hotel and Room Reservations

The Carolina Inn

211 Pitsboro Street
Chapel Hill, NC 27514

Room rate is \$179 plus tax, single/double. Please note that the special IAAO rate is offered on a space availability basis, until Saturday, April 21, 2018.

For hotel reservations call 800-962-8519 or visit www.carolinainn.com. Complimentary wireless internet access will be available in all guest rooms. Your discount code is 626056.



Climate

Early June daytime highs average 85° F and nightly lows average 64° F.

Transportation

Chapel Hill is located in central North Carolina within 20 miles of the RDU International Airport. Amtrak and Bus Stations are within 30 minutes of downtown Chapel Hill. Two major Interstates (I-40 and I-85) pass through Orange County. Once you are there, the in-town bus transit system is fare-free and numerous taxi companies service the area. Chapel Hill is known for its walkability, plus bicycle rentals are available.

IAAO's Legal Committee

IAAO's Legal Committee 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 Committee organizes the annual IAAO 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 committee.

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. Other than Continuing Legal Education (CLE), IAAO will not be submitting requests for continuing education to individual states.

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(s) when registering. Due to significant variations in each state's CLE rules and regulations, IAAO cannot guarantee that states will approve the seminar for CLE accreditation.

Attorneys may be eligible to receive CLE credit through reciprocity or through self-submission in some states. For more information, contact Heather Steel (steel@iaao.org).

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