November 5–7, 2026
Tax Section Fall Meeting

The Westin

Sarasota



Michael J. Wilson
2026–2027 Chair
Tax Section of The Florida Bar



Welcome to The Westin

Overlooking Sarasota Bay and downtown, The Westin Sarasota offers a luxurious retreat near St. Armands Circle, Mote Marine Aquarium, Siesta Key, and Lido Key. Enjoy modern accommodations, a full-service spa and fitness center, signature dining, and a rooftop pool and bar with spectacular views. Whether traveling for business or pleasure, The Westin Sarasota offers the perfect blend of comfort, wellness and coastal style.

The Westin
100 Marina View Dr.
Sarasota, FL 34236

866-912-1077

westinsarasota.com

Rooms start at $249. The Tax Section's room block closes on October 9.

Reserve Rooms



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Thursday, November 5

3–5 PM	Directors' Committee Meeting Williams Parker, 50 Central Avenue, 8th Floor
5–6:30 PM	Reception at Williams Parker
7–9 PM	Directors' Dinner at Sage Restaurant

Friday, November 6

7–8 AM	Breakfast
8 AM–4 PM	CLE: M & A Tax Planning, Structuring, and Drafting (separate registration required)
4–5 PM	Women in Tax
5–7 PM	Chair's Welcome Reception

Saturday, November 7

7–9 AM	Breakfast
8 AM–12:30 PM	Division and Committee Meetings
12:30–2 PM	Executive Council Meeting and Luncheon

Register





2026 Tax Section Fall Meeting

Pricing

Member/Sponsor Registration $300

Chair's Welcome Reception, Member Breakfast, and Executive Council Luncheon

Guest Registration

Chair's Welcome Reception, and Member Breakfast

- Children 2–13 No Charge
- 14 and older $180

Directors' Dinner at Sage Restaurant $225

CLE: M & A Tax Planning, Structuring and Drafting (register separately here)

In-Person Live Event: Tax Section member $365, Non-section member $460, Full-time law college faculty/student $295, Fee waiver $190 *(Requires discount code. Must meet qualifications. For more information, email accounting@floridabar.org.)*

Live Webcast: Tax Section member $415, Non-section member $510

24/7 On-Demand and Downloadable Audio products of this course will be available to purchase following the in-person seminar.

Register for Fall Meeting

2026 Tax Section Fall Meeting CLE

M & A Tax Planning, Structuring and Drafting

This comprehensive CLE offers a practical look at federal and state tax issues throughout the M&A lifecycle, providing practical strategies to help professionals structure deals, manage risk, and better advise clients. (9980) 7 CLE, 1 Ethics, 1 Technology (CPE credit pending approval). Certification credits: 7 Tax Law, 7 Business Litigation. Special thanks to Program Co-Chairs Trevor Johnson and Justin Wallace.

8–8:10 AM
Welcome and Introduction
Program Co-Chairs
Trevor Johnson, Williams Parker
Justin Wallace, Shumaker, Loop & Kendrick

8:10–9 AM
Pre-Sale Planning
Trevor Johnson & Lorenzo Fernandez
Williams Parker

9–9:10 AM
Break

9:10–10 AM
F - Reorganize/Rollover
Melodie "Dee" Menzer, Trenam

10–10:10 AM
Break

10:10–11 AM
Tax Insurance
Doug Brody, Symphony Tax

11–11:10 AM
Break

11:10–12 PM
State Tax Considerations
Josh Littlejohn & Mary Jo Dolson, CBIZ

12–1 PM
Lunch (included with live registration)

1–1:50 PM
Drafting Tax Provisions in M&A Agreements
Prestin Weidner, Hill Ward Henderson

1:50–2 PM
Break

2–2:50 PM
Ethics
Adam Smith, BizTxLaw

2:50–3 PM
Break

3–4 PM
AI and Tax
Susan Massey, Blue J

4 PM
Women In Tax

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Sarasota

Things to Do While Visiting

Whether you're planning a long getaway or exploring close to home, you'll discover countless things to do in Sarasota: top-tier museums and theaters, outdoor adventures, and acclaimed dining and shopping.

Explore Visit Sarasota's guides to area beaches, featuring iconic white-sand shores and hidden coastal treasures, and its calendar of local events celebrating music, food, arts and community. Everything you need is here — your ultimate guide to experiencing everything that makes Sarasota, Florida, an unforgettable vacation spot.

Source: Visit Sarasota.

Sarasota Highlights

Marie Selby Botanical Gardens – Composed of 15 acres on Sarasota Bay, Selby Gardens is the only botanical garden in the world dedicated to the display and study of epiphytic orchids and bromeliads. It is also the world's first net positive energy botanical garden complex, generating more energy than it consumes. Located just 1 mile from The Westin Sarasota, Selby Gardens was named one of *Time* magazine's "World's Greatest Places 2024," recognized in *The Wall Street Journal* as "Best of Architecture of 2024," selected as *USA Today* "2025 Top 10 Botanical Gardens in the U.S.," featured in *Vogue* magazine 2025 "Best Botanical Gardens in the US," and honored with a 2025 Global Vision Award by *Travel + Leisure*.

Mote Science Education Aquarium (Mote SEA) – Recently celebrating its one-year anniversary, Mote SEA features a 146,000-square-foot campus with over 1 million gallons of exhibits, including a two-story 400,000-gallon Gulf of Mexico habitat. Mote Marine Laboratory & Aquarium has an over 70-year legacy as a non-profit global marine research and science education institution. Mote was founded in 1955 by a single researcher, Dr. Eugenie Clark – nicknamed "The Shark Lady," who was a world authority on sharks and fish. Today, Mote has grown into ten campuses stretching from Sarasota Bay to Key West. Mote has 38 diverse world-class research programs and centers of excellence studying oceans locally and internationally, with an emphasis on positively impacting conservation and sustainable use of marine resources.



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