



INTERNATIONAL ASSOCIATION  
of ASSESSING OFFICERS

*Valuing the World*

# IAAO ANNUAL LEGAL SEMINAR

Dec. 1-2, 2022 • Austin, Texas



**ASSESSORS, LAWYERS,  
AND TAXPAYERS:**

*We're in this together*

Highlighting various aspects of the assessment process and hearings, the 2022 IAAO Legal Seminar focuses on finding common ground and how to communicate among a diverse set of professionals and citizens, when tensions and stakes are high.

*Learn more at [www.iaao.org/legalseminar](http://www.iaao.org/legalseminar)*

# IAAO ANNUAL LEGAL SEMINAR *Program*

## Thursday, Dec. 1, 2022

- 7:30 – 8 a.m. Continental Breakfast and Registration
- 8:00 – 8:15 a.m. Opening Remarks  
*Legal Task Force Chair, N. Joel Moser, Shareholder, Bernstein Shur*



### *What's Been Going On Since We Last Met*

#### **Moderator: TBD**

- 8:15 – 9:15 a.m. Breakdown of the Assessment & Appeal Process  
*N. Joel Moser, Esq., Portland, ME*
- 9:15 – 10:15 a.m. Preparing To Be a Witness  
*Robert "Bobby" Lee, Lee Law Firm, Mt. Juliet, Tennessee (Lawyer's perspective)*  
*Edye McCarthy, Town of Greenburgh Assessor (Assessor's perspective)*  
*Stacey Fitts, Sr. Director, Asset Management Renewables, Onward Energy (Taxpayer's perspective)*
- 10:15 – 10:30 a.m. Break
- 10:30 – 11:15 a.m. Preparing To Be a Witness (Panel Discussion)
- 11:15 a.m. – 12:30 p.m. Cases of Note in Your Jurisdictions  
*Thomas A Jaconetty, Esq., Chicago, IL*
- 12:30 – 1:30 p.m. Luncheon provided at the hotel



### *Complex Issues and Valuation Problems*

#### **Moderator: TBD**

- 1:30 – 3 p.m. Direct & Cross Examination Strategies  
*Will Shepherd, Esq., General Counsel, Hillsborough County Property Appraiser's Office Robert E.V. Kelley, Esq, Shareholder – Hill Ward Henderson*
- 3 – 3:15 p.m. Break
- 3:15 – 4:15 p.m. Identifying and Recognizing When You Are Dealing with a Sovereign Citizen—"Tax Defiers"  
*J. Paige Butler, Intelligence Analyst, Federal Bureau of Investigation*

## Friday, Dec. 2, 2022

- 8 – 8:30 a.m. Continental Breakfast and Registration



### *Special Topics*

#### **Moderator: TBD**

- 8:30 – 10 a.m. Mediation and Conflict Resolution  
*N. Joel Moser, Esq., Portland, ME, Edye McCarthy, Town of Greenburgh Assessor*
- 10 – 10:30 a.m. Break
- 10:30 – 11:30 a.m. Engaging Experts & Attorney Client Privilege  
*Zack Brandwein, Attorney, Bernstein Shur*
- 11:30 a.m. – 12:45 p.m. Break & Luncheon provided at the hotel



### *Ethics and Commercial Real Estate Recovery*

#### **Moderator: TBD**

- 12:45 – 1:45 p.m. You appraised what?  
*Paul Dailey, Multnomah County, Assessment & Taxation*
- 1:45 – 2:45 p.m. Anatomy of an Assessment Defense; Virginia International Gateway v. City of Portsmouth  
*Andrew McRoberts, Sands Anderson PC*
- 2:45 – 3 p.m. Break
- 3 – 4 p.m. Ethics – Preparing Demonstrative Evidence: Persuasion & Use of Technology or Strategies for Witness Examination, Yours and Theirs  
*Claude Ducloux, Esq., Austin, TX*
- 4 – 5 p.m. Litigation Ethics: Rules, Real Stories, and Regrets  
*Claude Ducloux, Esq., Austin, TX*

*Program is subject to change.*

**The Legal Seminar provides an opportunity to obtain personal knowledge from across the country on legal issues from the parties involved or knowledgeable following extensive time researching the issue. I believe this to be an essential benefit.** —Marsha Standish

*Learn more at*  
**[www.iaao.org/legalseminar](http://www.iaao.org/legalseminar)**

# IAAO ANNUAL LEGAL SEMINAR

*Omni Austin Hotel Downtown • Dec. 1 – 2, 2022*

## HOTEL



**Omni Austin Hotel Downtown**  
**700 San Jacinto at 8th Street**  
**Austin, Texas, 78701**

Austin is host to the Annual Legal Seminar and the seminar will take place at the Omni Austin Hotel Downtown. The room rate for seminar attendees is \$211 per night, plus various taxes. The hotel cut-off date is 5 p.m. on Nov. 9.

- Please note that the special IAAO room rate is offered on a first come-first-served space availability basis only until 5 p.m. Wednesday, Nov. 9, 2022.
- To reserve a room you may call (512) 476-3700 or visit [www.iaao.org](http://www.iaao.org) and click on “Legal Seminar” under the events tab to book on line. Or, visit the direct link: <https://bit.ly/3xpWRjq>

## TRANSPORTATION



**Super Shuttle** serves the Austin-Bergstrom International Airport (AUS) Visit [www.supershuttle.com/locations/Austin-Aus](http://www.supershuttle.com/locations/Austin-Aus) for more information.

**Public Transportation:** Capital Metro’s 100-AirportFlyer bus ([www.capmetro.org/airport](http://www.capmetro.org/airport)) runs to and from the Austin-Bergstrom International Airport (AUS) every 30 minutes. Direct access to the Downtown area is \$1.25.

## SCHOLARSHIPS AVAILABLE



The IAAO Scholarship Fund exists for the purpose of promoting ad valorem appraisal professionalism. The Scholarship Fund is available to all IAAO members who need financial assistance to attend IAAO educational activities, including the Legal Seminar.

The application can be found on our website under the Resources menu and must be submitted no later than 30 days prior to the event. The maximum award for this seminar is \$1,250 per recipient. Contact Toni Eichholz with questions, [eichholz@iaao.org](mailto:eichholz@iaao.org).

## *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.

**CLE hours:** 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 Oct. 1 deadline. Indicate state(s) and attorney registration number when you register online or on the registration form. IAAO cannot guarantee that states will approve the seminar for CLE accreditation.

## *About IAAO*

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. It does not discriminate on the basis of sex, age, race, color, nationality, or ethnic origin in the administration of its policies. IAAO complies with the a.m.ericans with Disabilities Act.

IAAO membership information is available from IAAO headquarters. Call the Membership Department at 816-701-8100, email [membership@iaao.org](mailto:membership@iaao.org), or visit [iaao.org](http://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.

*Register today at* [www.iaao.org/legalseminar](http://www.iaao.org/legalseminar)

# IAAO Legal Seminar ♦ December 1-2, 2022 ♦ Austin, TX

## Three Ways To Register:

1. **Online** at [www.iaao.org/Legalseminar](http://www.iaao.org/Legalseminar)
2. **Fax** this completed registration form, if you are paying with a credit card, to 816-701-8149 or email to [mense@iaao.org](mailto:mense@iaao.org) or [weber@iaao.org](mailto:weber@iaao.org).
3. **Mail** this completed registration form and payment by check to the IAAO Bank Lockbox at:  
IAAO, PO Box 29900, Dept. 929, Phoenix, AZ 85038-0900.

**Registration or program questions? E-mail [mense@iaao.org](mailto:mense@iaao.org) or call 816-701-8109.**

## Step 1—Registration *(Please print legibly)*

\_\_\_\_\_  
First Name

\_\_\_\_\_  
Last Name

\_\_\_\_\_  
Title

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Employer

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Employer's Street Address

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City

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State

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Zip/Postal Code

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Country

\_\_\_\_\_  
Phone

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Fax

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E-mail

\_\_\_\_\_  
Emergency Contact Name

\_\_\_\_\_  
Phone

## Step 2—Registration Fees/Special Needs *(includes materials, continental breakfasts and lunches)*

	Discount fee by Sept. 30	Regular fee Oct 1 - Nov 18	Onsite Fee
IAAO Member	\$500	\$600	\$700
Nonmember	\$700	\$840	\$980
	<b>Amount Paid</b>		

If you have any special needs, we are here to accommodate you. Please indicate any dietary/physical needs.

Dietary:  Diabetic  Vegetarian

Food Allergies \_\_\_\_\_

Physical:  Please check if you require special accommodations to participate. E-mail a description of your needs by Nov. 18, 2022 to [mense@iaao.org](mailto:mense@iaao.org). After Nov. 18 we cannot guarantee we can accommodate requests

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

Check here if seeking CLE credit.

State and attorney registration # \_\_\_\_\_

**(Deadline to request CLE is Oct. 1, 2022)**

## Step 3—Payment

Check (payable to IAAO)  Visa  MasterCard  AMEX  
(U.S. currency only. Allow 10 working days for IAAO to receive mailed registrations)

### Credit Card Payments

To pay by credit card, attendees are recommended to register online. To pay by credit card using this form, email or fax (816.701.8149) completed form to IAAO and then contact Allyson Weber (816-701-8138) or Rachel Mense (816-701-8109) with card information.

### Refund/Cancellation, Photo and Health Policy

See next page for more details

X \_\_\_\_\_

Attendee agreement signature

## **IAAO Meeting Policies**

*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 \$150 processing fee, only if received in writing by November 1, 2022. No refunds will be made after November 1, 2022. No refunds are given for no-shows. Send your cancellation notice to [mense@iaao.org](mailto:mense@iaao.org), by mail to IAAO, 314 W. 10th St., Kansas City, MO 64105 or by fax to 816-701-8149. By completing and submitting this registration form, you agree to abide by the refund and cancellation policy. Registrants of IAAO Events agree to allow IAAO and its official photographer to photograph them in the context of the event. Footage captured by IAAO's photographer may be used in future print and electronic promotional and archival materials. For questions or concerns, please call 816-701-8100 or email [info@iaao.org](mailto:info@iaao.org).*

*Attendee assumes all risks and accepts sole responsibility for any injury (including, but not limited to, personal injury, disability, and death), illness, damage, loss, claim, liability, or expense, of any kind, that attendee may experience or incur in connection with attending the 2022 IAAO Legal Seminar. Attendee hereby releases, covenants not to sue, discharges, and holds harmless the International Association of Assessing Officers ("IAAO") and its employees, agents and representatives of and from any such claims, including all liabilities, claims, actions, damages, costs, or expenses of any kind arising out of or relating thereto.*

*Specifically relating to the global COVID-19 pandemic, attendee acknowledges the highly contagious nature of COVID-19 and voluntarily assumes the risk of exposure or infection by attending the Event, and that such exposure or infection may result in personal injury, illness, disability, and/or death to attendee. Attendee understands that the risk of becoming exposed to or infected by COVID-19 at the Event may result from the actions, omissions, or negligence of IAAO, its employees, agents and representatives and others who may attend the Event or their families, colleagues, or others with whom they may have contact. Accordingly, attendee understands and agrees that this release includes any claims based on the actions, omissions, or negligence of IAAO, its employees, agents and representatives, whether a COVID-19 infection occurs before, during or after the Event.*

*In addition to all other rules and regulations relating to the attendee's attendance at the Event, attendee agrees to comply with all COVID-related procedures that may be implemented by IAAO and the event facilities, including, but not limited to, mask-wearing and social distancing requirements and restrictions on certain activities that carry higher COVID-related risk, in order to protect as much as possible the health and safety of all event attendees.*