



The Voice of the 1031 Industry

FEA 2021 Annual Conference

1031 – A Century of Growth

September 22–24, 2021

The Palmer House, Chicago, Illinois

SCHEDULE OF EVENTS*

TOTAL Minutes 960

Wednesday, September 22, 2021 (360 min.)

- 7:30 a.m. CES® Exam Registration – Grant Park Room Foyer (6th Floor)
- 8:00–10:30 a.m. CES® Exam – Grant Park Room (6th Floor)
- 8:00 a.m.–4:30 p.m. FEA Registration Desk Open – Adams/Monroe Foyer (6th Floor)
- 9:00 a.m.–12:30 p.m. FEA Board of Directors Meeting – Water Tower (6th Floor)
Breakfast starting at 9:00 a.m. and Board meeting starting at 9:30 a.m.
- 9:00 a.m.–12:00 p.m. (180 min.) **1031 Boot Camp** – Adams (6th Floor)
Hugh Pollard, CES®, Senior Vice-President, Investment Property Exchange Services, Inc. (IPX1031®)
- 12:30–4:30 p.m. Exhibitor Set-Up – Adams (6th Floor)
- 1:00–4:00 p.m. (180 min.) **Reverse Exchanges Boot Camp** – Adams (6th Floor)
Martin S. Edwards, JD, CES®, Managing Director, Accruit, LLC
David Gorenberg, JD, CES®, Managing Director, Accruit, LLC
- 4:30–5:15 p.m. New Member/First Time Attendee Orientation – Grant Park Room (6th Floor)
- 5:30–7:00 p.m. FEA Board of Directors Welcome – Chicago Room (5th Floor)
-Sponsored by MUFG Union Bank N.A.

Thursday, September 23, 2021 (350 min.)

- 6:30 a.m.–7:00 a.m. Exhibits Set Up - Monroe (6th Floor)
- 7:00 a.m.–3:55 p.m. FEA Registration Desk Open – Adams/Monroe Foyer (6th Floor)
- 7:00 a.m.–4:05 p.m. Exhibits Open – Monroe (6th Floor)
- 7:00–8:00 a.m. FEA Networking Breakfast – Monroe (6th Floor)
- Sponsored by Capital Square 1031
- 8:00–8:30 a.m. **Welcome and Opening Remarks**
- 8:30–9:20 a.m. (50 min.) **General Session: View from the Hill and FEA GAC Updates** – Adams (6th Floor)
David E. Franasiak, Esq., FEA Lobbyist, Williams & Jensen
David A. Brown, Esq., CES®, President, Iowa Property Exchange, LLC
Mary Cunningham, CES®, President, CDEC 1031 Exchange - Wintrust Bank
James I. Miller, Esq.- Legal Counsel, Investment Property Exchange Services, Inc. - (IPX1031®)
- 9:20–9:40 a.m. Networking Break with Exhibitors – Monroe (6th Floor)
- 9:40–10:30 a.m. (50 min.) **General Session: Section 1031 Real Property** – Adams (6th Floor)
Bradley T. Borden, JD, MBA, LL.M., Professor of Law, Brooklyn Law School
- 10:30–10:50 a.m. Networking Break with Exhibitors – Monroe (6th Floor)
- 10:50–11:40 a.m. (50 min.) **General Session: Economic Outlook for a Post-COVID World** – Adams (6th Floor)
Jason Turner, COO, Great Lakes Advisors, Wintrust Wealth Management



The Voice of the 1031 Industry

FEA 2021 Annual Conference

1031 – A Century of Growth

September 22–24, 2021

The Palmer House, Chicago, Illinois

SCHEDULE OF EVENTS*

- 11:40 a.m.–1:00 p.m. **Lunch & Annual Business Meeting** – Monroe (6th Floor)
-Sponsored by Realized Holding LC
- 1:00–1:50 p.m. (50 min.) **General Session: Safety and Security: Insurance, Cyber, and Mega-Large Deposits**
– Adams (6th Floor)
Moderator: Jeffrey R. Peterson, President, CPEC1031, LLC
Eugene Kennedy III, Managing Director/NY Market Executive, Customers Bank
Adam McDonough, Executive VP, Lockton Insurance Brokers, LLC (Virtual)
Mario D'Amore, SVP, Director, Capital One
Raymond English Jr., Dir. Business Information Security, MUFG Union Bank (Virtual)
- 1:50–2:10 p.m. Networking Break with Exhibitors – Monroe (6th Floor)
- 2:10–3:50 p.m. (100 min.) **General Session: Dazed & Confused – Perplexing, Confounding & Thorny 1031 Issues** – Adams (6th Floor)
Moderator: Jeffrey R. Peterson, President, CPEC1031, LLC
David Shechtman, Senior Council, Faegre Drinker Biddle & Reath, LLP
Matthew Rappaport, Esq. LL.M., Falcon Rappaport & Berkman PLLC (Virtual)
- 3:55–4:45 p.m. (50 min.) **Annual Tax Update** – Adams (6th Floor)
Mary B. Foster, Esq., CES®, President, 1031 Services, Inc.
- 4:45–6:15 p.m. **Reception** – Chicago Room (5th Floor)
- 6:30 – 8:00 p.m. **Architectural Cruise – Walk to Tribune Tower Plaza (River Walk Level)**
400 N. Michigan Ave – Take stairs down to dock
Wendella Boat Tours (Beverages only)
Sponsored by Syndicated Equities
- Friday, September 24, 2021 (250 min)**
- 7:30 a.m.–5:30 p.m. FEA Registration Desk Open – Adams/Monroe Foyer (6th Floor)
- 7:30 a.m.–2:00 p.m. Exhibits Open – Monroe (6th Floor)
- 7:30–8:30 a.m. FEA Breakfast and Committee Meetings – Monroe (6th Floor)
-Sponsored by Mountain V Oil & Gas Inc.
- 8:30–10:10 a.m. (100 min.) **Hot Topics (25 min each)** – Adam (6th Floor)
- **Due Diligence in a Quarantine on Real Property Investments**
Tracy Treger, Principal, Syndicated Equities
Amy Leeds, COO, Financial Advisor Fortitude Investment Group
 - **DST Secondary Sale – Investors Selling Their DST Interests**
Rob Johnson, Head of Wealth Management, Realized Holding
Scott Offerman, Founder, 1031 Financial
 - **Implications of 1031 Exchanges Involving Cannabis Properties**
Matthew Rappaport, Esq. LL.M., Falcon Rappaport & Berkman PLLC
 - **Personal Use Properties – Converting To and From 1031 Eligible Property**
James I. Miller, Esq.- Legal Counsel, Investment Property Exchange Services, Inc. (IPX1031®)
- 10:10–10:30 a.m. Networking Break with Exhibitors – Monroe (6th Floor)
- 10:30–11:20 a.m. (50 min.) **Breakout session #1: Non-Safe Harbor (Advanced)** – Monroe (6th Floor)
Max A. Hansen, JD, CES®, Executive Director, Accruit, LLC
- Breakout session #2: Observing the “Same Taxpayer” Rule in the 1031 Exchange (Basic)** – Adam (6th Floor)
Matthew Rappaport, Esq. LL.M., Falcon Rappaport & Berkman PLLC (Virtual)
- 11:20–11:50 a.m. Networking Break with Exhibitors – Monroe (6th Floor)



The Voice of the 1031 Industry

FEA 2021 Annual Conference

1031 – A Century of Growth

September 22–24, 2021

The Palmer House, Chicago, Illinois

SCHEDULE OF EVENTS*

11:50 a.m.–1:00 p.m.

Lunch, President & Incoming President Messages, & CES® Address

– Monroe (6th Floor)

-Sponsored by ExchangeRight Real Estate LLC

1:00–1:50 p.m. (50 min.)

General session: Diversity, Equity, & Inclusion in Organizations – Adams (6th Floor)

Amit Kramer, Associate Professor, School of Labor and Employment Relations, University of Illinois at Urbana-Champaign

1:50–2:00 p.m.

Networking Break with Exhibitors – Monroe (6th Floor)

2:00–2:50 p.m. (50 min.)

General Session: Ethical Issues for QIs & Attorneys Involved with LKEs

– Adams (6th Floor)

Bradley T. Borden, JD, MBA, LL.M., Professor of Law, Brooklyn Law School

2:50–3:10 p.m.

Closing Comments & Prize Drawings – Adams (6th Floor)