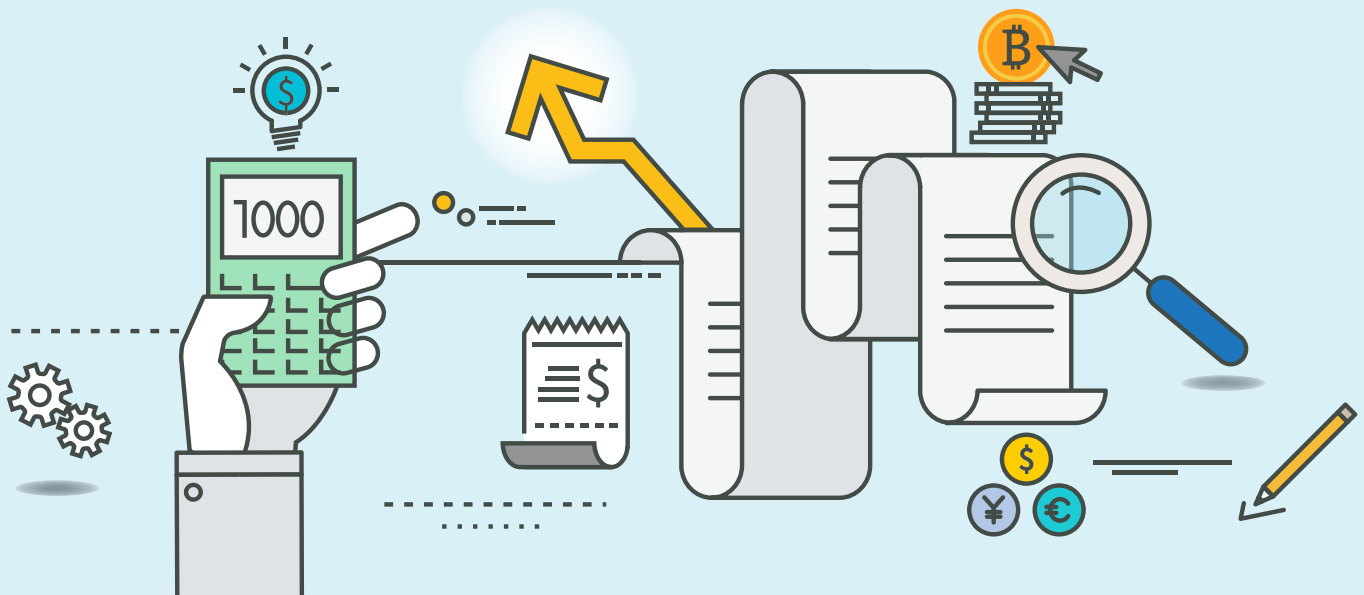


2020 MEGA Tax Virtual Conference



Tax is evolving. Are you?
Adapt to the new normal

Register today at



ohiocpa.com/MEGA

Dec. 14-15, 2020

8:30 a.m. – 5:00 p.m.

Why attend

Choose from a variety of global, federal, state, and local tax topics to create a customized learning experience. This 2-day conference will provide you with the latest in tax reform updates to help you navigate this pandemic environment. Prepare for the 2020 tax filing season, get tips to improve workflow and build business, and refine tax planning strategies. Attendees will receive a complimentary tax update in January 2020 to address late-breaking tax changes.

- **Unwinding the Tax implications of the CARES Act**
- **PPP loan forgiveness**
- **Remote working tax issues amid the pandemic**
- **Social security update: planning for today and tomorrow**
- **Ethics in Ohio Tax Practice**

Returning this year

This year we are offering a track exclusively for emerging professionals!

Essential Skills Track: In partnership with Ohio University, this single-day track features both sessions and workshops on core fundamentals to offer a hands-on learning experience.

Virtual networking Hour: Connect with fellow attendees at the virtual networking event held on December 14 from 5:00 – 5:30 p.m.

Register today at



ohiocpa.com/MEGA



Download
the app



Search for "OSCPA Mega Tax Conference 2020"



Sign in with the email address provided when you registered.



Up your tax game this season!

We have you covered with all the latest tax developments in a variety of hot topics.

November 16:
Financial Reporting Update for Tax Practitioners

November 24:
Tax Planning for Small Businesses

November 25:
Advanced Tax Planning S Corporations

December 2:
Annual Tax-Planning Guide for S Corporations, Partnerships, and LLCs

December 3:
Fiduciary Accounting and Tax Issues of Estate and Trust (BASIC)

December 7:
Choice and Formation of Entity

December 9:
Top 10 Tax Topics This Year

December 11:
The Essential Multistate Tax Update

Find these courses and more at www.my.ohiocpa.com!

Details

Date: Dec. 14-15, 2020

Time: 8:30 a.m. – 5:00 p.m.
(registration begins at 8:00 a.m.)

Credits: 16

***SAVE MORE THAN \$50**
when you register by Nov. 16 at the member rate!

REGISTRATION FEES

BOTH DAYS: Product #54145

- Regular \$624
- Member \$469
- Early Discount \$574*
- Member early discount \$419*

SINGLE DAY: Dec. 14 | Product #54146

- Dec. 15 | Product #54147
- Regular \$495
- Member \$339
- Early discount \$444*
- Member early discount \$289*

CONTACT INFORMATION

Society ID # (found on the back cover with address) _____

Full Name _____

Email _____

Firm _____

Business Address _____

City _____ State _____ Zip _____

Phone _____

After Hours Phone _____

Special Needs _____

PAYMENT INFORMATION



ONLINE

To register and pay online, visit
ohiopa.com/MEGA

DAY 1

GENERAL SESSION 8:30 – 10:00 a.m.

- 1. Economic and Industry Outlook: Growth & Longevity in the Age of the Pandemic & Presidential Election Year **TX**

CONCURRENT SESSIONS 10:15 – 11:45 a.m.

- 2. Paycheck Protection Program Loan Forgiveness Update **TX**
- 3. Social Security Update: Planning for Today and Tomorrow **TX**
- 4. Critical Thinking & Problem Solving for the Tax Professional **TX**

CONCURRENT SESSIONS 12:45 – 2:00 p.m.

- 5. Section 199A Update: Tax Planning and Issues to Consider **TX**
- 6. Ohio Economic Incentives and Tax Credits **TX**
- 7. Building a Tax and Financial Planning Advisory Business **TX**
- 8. Key Tax Fundamentals: Individual **TX**

CONCURRENT SESSIONS 2:15 – 3:30 p.m.

- 9. Choice of Entity: Reality vs Fantasy **TX**
- 10. Legislative Update **TX**
- 11. Opportunity Zones and 1031 Exchanges: Unlocking the Opportunity **TX**
- 12. Key Tax Fundamentals: Business **TX**

CONCURRENT SESSIONS 3:45 – 5:00 p.m.

- 13. Remote Working Tax Issues Amid the Pandemic **TX**
- 14. Ohio Sales & Use Tax: Recent Trends, Developments and Opportunities **TX**
- 15. Tax Efficient Investing: Future Forward **TX**
- 16. Unlocking the Power of Tax Data and Analytics **TX**

DAY 2

GENERAL SESSION 8:30 – 10:00 a.m.

- 17. Unwinding the Tax Implications of the CARES Act **TX**

CONCURRENT SESSIONS 10:15 – 11:45 a.m.

- 18. Cryptocurrency Tax Reporting **TX**
- 19. Multistate Taxation: Mastering Wayfair and Economic Nexus **TX**
- 20. Estate Planning Strategies: A Guide to Retirement **TX**
- 21. An Update From the IRS **TX**

CONCURRENT SESSIONS 12:45 – 2:00 p.m.

- 22. Global Tax Developments and Planning **TX**
- 23. An Update from the Ohio Department of Tax **TX**
- 24. Tax Technology, Innovation & Analytics: Strategy & Transformation **TX**

CONCURRENT SESSIONS 2:15 – 3:30 p.m.

- 25. Not-for-Profit Tax Update **TX**
- 26. State Tax Implications Facing the Cannabis Industry **TX**
- 27. Individual Tax Planning Strategies **TX**

CONCURRENT SESSIONS 2:15 – 5:00 p.m.

- 28. Ethics in Tax Practice: Ohio **TX**

CONCURRENT SESSIONS 3:45 – 5:00 p.m.

- 29. Paycheck Protection Program Loan Forgiveness Update **TX**
- 30. Tax Planning for Small Businesses **TX**

8:15 - 8:30 a.m.	Welcome	
8:30 - 10:00 a.m.	1. Economic and Industry Outlook: Growth & Longevity in the Age of the Pandemic & Presidential Election Year TX <ul style="list-style-type: none"> Learn about the state of the economy in the U.S and Ohio heading into 2021, including forecasts for future growth and indicators for warning signs. Breakdown how election results will impact the economy, federal and state budget, and tax legislation. Explore the latest trends from tax law changes, the future of the profession and opportunities for growth as a trusted advisor. 	
10:00 - 10:15 a.m.	Break	
10:15 - 11:45 a.m.	Federal Tax	State & Local Tax
	2. Paycheck Protection Program Loan Forgiveness Update TX <ul style="list-style-type: none"> Unpack the status of additional legislation and significant questions that have been resolved or clarified. Breakdown the bank and SBA process, and walkthrough the loan forgiveness application 3508 & 3508 EZ. Layout key steps for your organization or client's success with the forgiveness process. 	
11:45 a.m. - 12:45 p.m.	Lunch	
12:45 - 2:00 p.m.	5. Section 199A Update: Tax Planning and Issues to Consider TX <ul style="list-style-type: none"> Learn about the current status of 199A, including IRS interpretation of the regulation as evidence through FAQ. Determine how to apply the aggregation rules of Reg. Sec. 199A. Understand the status of the outstanding guidance issues regarding QBI reductions and the aggregation rules. 	6. Ohio Economic Incentives and Tax Credits TX <ul style="list-style-type: none"> Delve into Ohio tax credits and incentives in four major areas: job creation and retention, capital investment, job training, and innovation. Discuss developments in federal programs and assess the impact in Ohio. Explore how to incorporate these credits and incentives into tax planning strategies.
	Break	
2:00 - 2:15 p.m.	Break	
2:15 - 3:30 p.m.	9. Choice of Entity: Reality vs Fantasy TX <ul style="list-style-type: none"> Understand the many factors to consider when it comes to entity choice, including tax rates, shareholder impact, exit strategy, long-term expectations, etc. Recognize key taxpayer attributes which may affect the recommendation of entity choice. Summarize the top effective rates of different entity types, and when single or double taxes may apply. 	10. Legislative Update TX <ul style="list-style-type: none"> Gain insights into timely state and federal legislative issues. Unpack regulatory reforms at the Department of Taxation and Accountancy Board of Ohio. Review state and federal judicial decisions impacting tax developments.
	Break	
3:30 - 3:45 p.m.	Break	
3:45 - 5:00 p.m.	13. Remote Working Tax Issues Amid the Pandemic TX <ul style="list-style-type: none"> Analyze the challenges businesses are dealing with to properly withhold city and state taxes from employees' wages, including HB197. Explore how remote working is being treated across the country and federal legislation being considered to ease the state controversies. Unpack nexus considerations for state and local jurisdictions and what remote workers may mean for payroll apportionment factors. 	14. Ohio Sales & Use Tax: Recent Trends, Developments and Opportunities TX <ul style="list-style-type: none"> Review recent developments in Ohio sales/use tax, including how to maximize exemptions and planning opportunities. Participate in an in-depth discussion of recent Supreme Court and BTA cases interpreting the resale exemption and scope of taxable employment services, which can provide taxpayers with significant tax savings. Address Department of Taxation audit initiatives and best practices to navigate a sales/ use tax audit.

Welcome

Break

Tax Planning Strategies

3. Social Security Update: Planning for Today and Tomorrow TX

- Discuss changes to the Social Security program and how it works today.
- Review implications for planning strategies.
- Uncover myths and misinformation related to social security benefits.

Tax Essential Skills

4. Critical Thinking & Problem Solving for the Tax Professional TX

- Discuss application techniques for critical thinking and problem-solving in your current role.
- Draw connections to your work experience by analyzing case studies.
- Identify best practices for problem-solving and illustrate how to weigh alternative solutions/interpretations.

Lunch

7. Building a Tax and Financial Planning Advisory Business TX

- Gain insights into the why behind tax and financial planning advisory services and the role of the CPA.
- Identify tax & financial planning services and successful business models that provide client value.
- Review the key steps to developing and managing a tax & financial planning business including a helpful checklist.

8. Key Tax Fundamentals: Individual TX

- Break down filing status and interpret the filing requirements for individual taxpayers.
- Distinguish between standard and itemized deductions, including medical expenses, interest, taxes, charitable contributions, and miscellaneous deductions.
- Dive into popular tax planning strategies for individuals.

Break

11. Opportunity Zones and 1031 Exchanges: Unlocking the Opportunity TX

- Highlight some of the most important factors a potential investor should consider when weighing options.
- Compare the benefits and drawbacks of the opportunity zone program and the long-standing Section 1031 exchange in deferring or avoiding capital gains tax.
- Discuss ways to couple with other tax strategies like cost segregation to further enhance cash flows.

12. Key Tax Fundamentals: Business TX

- Identify tax advantages vs. disadvantages of business entity structures.
- Get in-depth practical guidance on the most common tax nuances for businesses.
- Discuss state and local tax impact and reporting requirements.


Break

15. Tax Efficient Investing: Future Forward TX

- Navigate ways to lower client tax liabilities across all types of investors and asset classes, such as stocks, bonds, and real estate.
- Learn why the mutual fund industry is being turned upside down by Exchange Traded Funds.
- Dive into Opportunity Zones and how this is affecting municipal bonds with lower individual tax rates.

16. Unlocking the Power of Tax Data and Analytics TX

- Identify opportunities for tax analytics and review current trends.
- Demonstrate how data analytics and visualization tools can be used to better understand the tax environment and support decision making, including tools that can be used as building blocks.

8:15 - 8:30 a.m.	Housekeeping/Announcements	
8:30 - 10:00 a.m.	17. Unwinding the Tax Implications of the CARES Act TX <ul style="list-style-type: none"> Gain insight into the many tax nuances within the CARES Act legislation. Highlight the most impactful individual and business tax provisions and implications to the 2020 tax year. Hear the latest updates and guidance at the federal level and review top questions surrounding the legislation going into the filing season. 	
10:00 - 10:15 a.m.	Break	
10:15 - 11:45 a.m.	Federal & International Tax	State & Local Tax
	18. Cryptocurrency Tax Reporting TX <ul style="list-style-type: none"> Get an overview of cryptocurrency and the basics of blockchain, including legislation, IRS priorities, and government activity. Delve into use cases and their impact on tax. Highlight the importance of being prepared for increased usage of digital assets for tax reporting and filing purposes. 	19. Multistate Taxation: Mastering Wayfair and Economic Nexus TX <ul style="list-style-type: none"> Review where states stand in a post-Wayfair era and key compliance challenges. Assess the different economic nexus thresholds and effective dates, including safe harbor provisions and increased spotlight on marketplace facilitator nexus. Discuss the evolving questions, long-term impact and how to analyze nexus going forward.
11:45 a.m. - 12:45 p.m.	Lunch	
12:45 - 2:00 p.m.	22. Global Tax Developments and Planning TX <ul style="list-style-type: none"> Understand tax reform and the evolving pandemic's impact on international business and the global economy. Determine tax planning considerations for U.S. multinationals and foreign corporations doing business in the U.S. Dive into tax complexities of cross-border situations and transactions and learn tax strategies that will open opportunities and reduce tax risk. 	23. An Update from the Ohio Department of Tax TX <ul style="list-style-type: none"> Obtain a behind-the-scenes look at key tax filing processes. Review key considerations to prepare for 2020 tax filing season. Discuss reporting tips and tricks including common issues and questions.
2:00 - 2:15 p.m.	Break	
2:15 - 3:30 p.m.	25. Not-for-Profit Tax Update TX  <ul style="list-style-type: none"> Identify crucial changes to the tax law that will affect not-for-profits and higher education sectors. Highlight changes to the Form 990 and how to avoid common reporting 'traps'. Navigate recent IRS guidance addressing unrelated business income issues. 	26. State Tax Implications Facing the Cannabis Industry TX <ul style="list-style-type: none"> Gain an understanding of state and federal regulatory conflict as it relates to the state legalized marijuana industry. Compare state tax design and rates and how changes in federal law would have implications for state tax revenue. Review how to prepare tax returns for state legalized marijuana entities.
3:30 - 3:45 p.m.	Break	
3:45 - 5:00 p.m.	29. Paycheck Protection Program Loan Forgiveness Update TX <i>(Note: This is a repeat session from day 1)</i> <ul style="list-style-type: none"> Unpack the status of additional legislation and significant questions that have been resolved or clarified. Breakdown the bank and SBA process and walkthrough the loan forgiveness application 3508 & 3508 EZ Layout key steps for your organization or client's success with the forgiveness process. 	

Housekeeping/Announcements

Break

Tax Planning Strategies

20. Estate Planning Strategies: A Guide to Retirement TX

- Walkthrough estate planning strategies and the impact of tax reform, SECURE Act and pandemic landscape.
- Distinguish the various types of generational skipping taxable transfers.
- Learn what questions to ask clients in order to help them devise and develop a long-term strategy.

Tax Operations & Risk Management

21. An Update From the IRS TX

- Discuss IRS hot topics including cybersecurity , and COVID Tax Tips.
- Review items of current interest - new programs, recent guidance, and timely reminders.
- Explore common tax compliance issues and deficiencies.

Lunch

24. Tax Technology, Innovation & Analytics: Strategy & Transformation TX

- Explore leading tax technologies that support enhanced reporting, collaboration and leverage data automation.
- Dive into the ways technology tools can be used to provide more accurate and proactive insights into business decisions that have tax implications.
- Understand the value of technology to drive greater efficiency, improve processes and manage risk as the tax landscape evolves and becomes ever more complicated.

Break

27. Individual Tax Planning Strategies TX

- Assess the impact of evolving tax regulations and guidance, including CARES Act and SECURE Act on individuals.
- Highlight individual tax and financial planning opportunities to consider year-round when it comes to investments and credits.
- Evaluate top planning strategies and tips for taking action before year-end.

28. Ethics in Tax Practice: Ohio TX

- Learn how to provide quality tax services with proper documentation and appropriate client communication.
- Discover how to steer clear of ethical complaints and disciplinary action.
- Review Ohio Statutes governing the practice of public accounting and Board of Accountancy rules governing the conduct of CPAs performing tax services in Ohio.

Break

30. Tax Planning for Small Businesses TX

- Review tax law changes and CARES Act impact on small to mid-size business owners.
- Focus on strategies that provide small businesses with benefits and relief during the pandemic and for 2020 tax year.
- Dive into tax tips to prepare for tax-filing season and to avoid costly penalties and interest.

Thank you to our event supporters:



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Check out

 ohiocpa.com/MEGA

for program information and updates.