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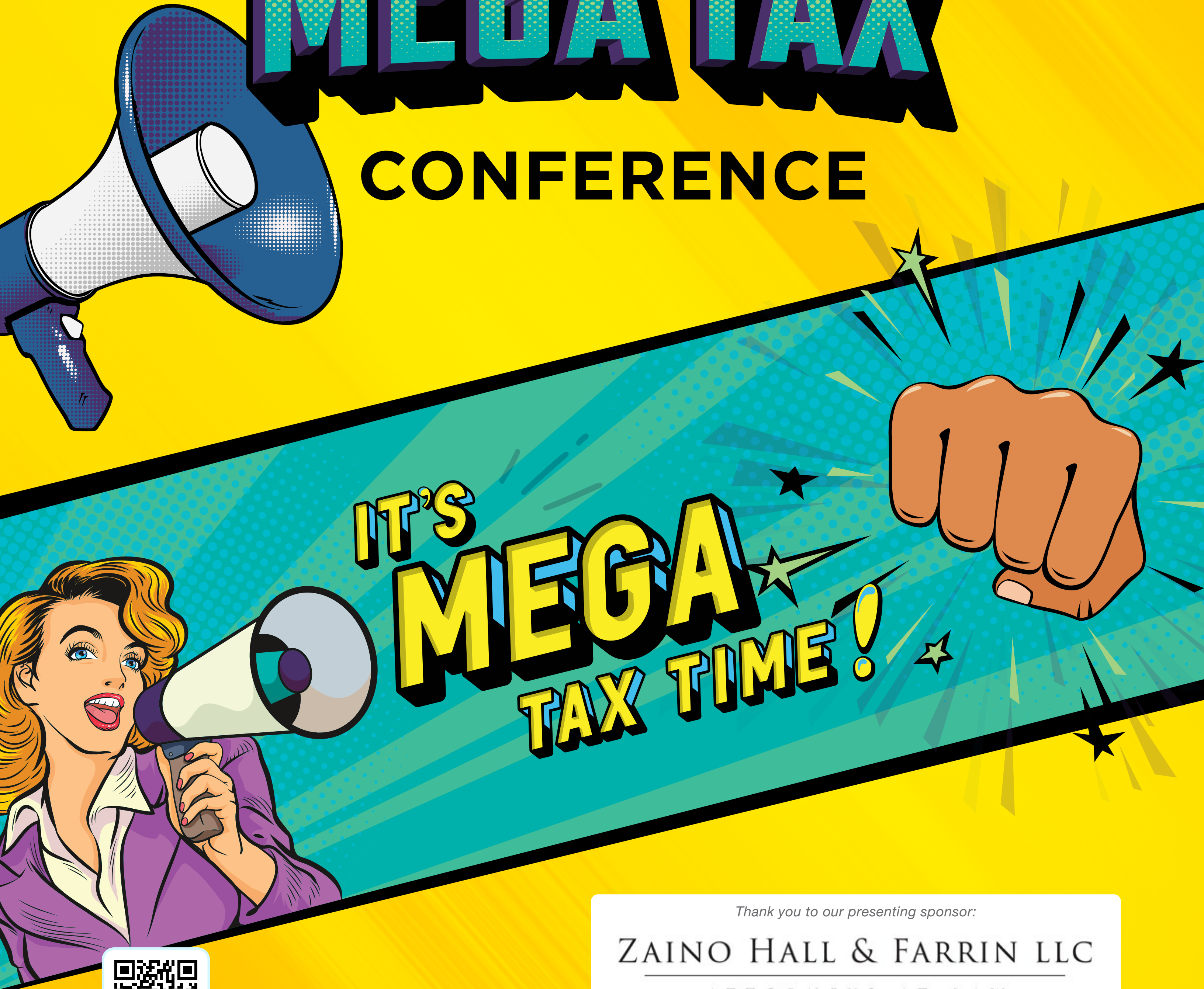

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Speaker Spotlight

Tony Nitti, CPA
Principal, Ernst and Young

in *@tony-nitti-ab64532a*

Session: Federal Tax Policy Outlook

Tony leads the S corporation team within the National Tax Department of EY US, with a focus on Section 1202. Tony is a prolific writer on tax topics and is a senior contributor at Forbes, where his column has the largest following. He has also published dozens of feature articles for several prominent tax publications.

Amy Arrighi, J.D.
Executive Director, Regional Income Tax Authority (RITA)

in *@amy-arrighi-83436b20*

Session: Municipal Income Tax

A respected resource, Arrighi is sought out by municipal officials, business organizations, elected officials and the media for her insight on municipal tax matters and is a frequent presenter at tax conferences and before municipal tax groups. She initially joined the Agency in 1993 as a Paralegal, left the Agency to attend law school, and returned in 2005 after seven years in private practice.

Michael McKeown, CPA, CFA
Chief Investment Officer, Marcum Wealth

in *@michaeltmckeown*

Session: Financial Planning & Tax Efficient Investing

Michael is responsible for leading the firm's investment research on capital markets. He created the firm's quantitative and qualitative due diligence process for analyzing investment managers across equities, fixed income, and alternative strategies. He authors market commentaries and quarterly investment strategy newsletters. In 2023, Michael was a Finalist for CIO of the Year by Institutional Investor RIA Intel.

Mindy Nett, CPA
Associate Professor, Kent State University

in *@mindy-nett-b3080011*

Session: Tax Research and Key Tax Fundamentals: Individual

Mindy joined the Kent State Accounting faculty full time in 2014. Prior to joining the department full time, she worked in public accounting for 22 years; first as a client-serving tax professional and most recently as the learning leader for tax professionals at Grant Thornton LLP.

Justin Breidenbach, CPA, CFE
Assistant Professor, Capital University

in *@justin-breidenbach-cpa-cfe-3536a428*

Session: Taxation of Marijuana

Justin presents at numerous professional conferences each year educating accountants on financial, regulatory, and market changes. Justin has served as an Associate Professor of Accounting at Ohio Wesleyan University and instructed courses in financial accounting & reporting, tax accounting, and auditing & assurance services.

Erin Eurenius, CPA, ESQ, CELA, MBA
Principal, West Side Elder Law

in *@erineurenius*

Session: Estate, Trust Planning, Elder Law

Erin has always focused her practice in the area of elder law, special needs planning and estate planning. She is a certified specialist as a CELA® by the National Elder Law Foundation.

Steve Hall, J.D., LLM
Partner, Zaino, Hall & Farrin, LLC

in *@stephen-hall-87799927*

Session: Pass-Throughs and Personal Income Update

Steve has provided state and local tax services, legal business counsel, and lobbying services to clients in multiple states and local jurisdictions for over twenty years. He advises clients on all types of state and local tax matters, including income tax, sales and use tax, property tax, gross receipts tax, excise tax, and public utility taxes.

Jane Pfeifer, CPA
Shareholder, Clark Shaefer Hackett

in *@janepfeifer*

Session: Non-Profit Tax Exempt Update

Jane heads the Clark Schaefer Hackett NFP tax group. She reviews Forms 990 and 990 PF for well over one hundred clients and consults with NFP clients regarding matters involving unrelated business income, excess benefit transactions, lobbying and political activities. She has represented clients before the IRS and has assisted with applications to obtain exempt status. Jane also serves on the firm's Not-for-Profit Services Committee.

Event Details

TOP 4 Reasons to Attend

1. **Build your own learning plan across 4 tracks, and hear from local and national tax leaders on:**
   - Federal & International Tax
   - State & Local Tax
   - Tax Planning Strategies
   - Tax Essential Skills
   - Tax Operations & Risk Management
   - Tax Ethics
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DAY 1 | Schedule at a glance

8:15-8:30 a.m.	**Conference kickoff** Welcome message from OSCPA and information to help you navigate your day.	
8:30-9:45 a.m.	**1. Federal Tax Policy Outlook** TX ***Tony Nitti, CPA*** *Principal, Ernst and Young*	
9:45-9:55 a.m.	**Conference break**	
	Federal Tax	**State & Local Tax**
9:55-10:45 a.m.	**2. Pandemic Relief and IRS Audit Best Practices** TX	**3. Municipal Income Tax** TX ***Amy Arrighi, J.D.*** *Executive Director, Regional Income Tax Authority (RITA)*
10:45-11:00 a.m.	**Conference break**	
11:00 a.m.-12:15 p.m.	**6. Federal Tax Update** TX	**7. Ohio Commercial Activity Tax: Planning Opportunities for Ohio-based Businesses** TX ***Richard Fry, J.D.*** *Partner, Buckingham, Doolittle & Burroughs, LLC*
12:15-1:00 p.m.	**Lunch & trivia**	
1:00-1:50 p.m.	**10. Non-Profit Tax Exempt Update** TX ***Jane Pfeifer, CPA*** *Shareholder, Clark Schaefer Hackett* ***Bridget Bush*** *Senior Manager, Clark Schaefer Hackett*	**11. Mobile Workforce: Challenges, Trends and What's Next** TX ***Sara Goldhardt, CPA*** *Director, State & Local Tax Services*
1:50-2:00 p.m.	**Conference break**	
2:00-3:15 p.m.	**14. An IRS Update** TX ***Nichelle Gray*** *Senior Stakeholder Liaison, Internal Revenue Service*	**15. Midwest Regional Update** TX
3:15-3:30 p.m.	**Conference break**	
3:30-4:45 p.m.	**17. To be determined** TX	

TX Taxes

1. Cont.

Tax Planning Strategies	Tax Essentials
4. Tax Considerations in M&A TX	**5. Tax Analytics** TX ***GTM***
8. Maximizing Benefits for your clients: Unpacking Recent Changes to Tax Credits TX ***Neil Shah*** *Senior Technical Director, Alliant Group* ***Rick Lazio*** *Senior Vice President, Former U.S. Congressman, Alliant Group*	**9. Key Tax Fundamentals** TX ***Scott Fraker, CPA*** *Fraker CPA LLC*
12. Financial Planning & Tax Efficient Investing TX ***Michael McKeown, CPA, CFA*** *Chief Investment Officer, Marcum Wealth*	**13. Tax Research** TX ***Mindy Nett, CPA*** *Associate Professor, Kent State University*
15. Cont.	**16. Key Tax Fundamentals: Individual** TX ***Mindy Nett, CPA*** *Associate Professor, Kent State University*

17. Cont.

DAY 2 | Schedule at a glance

Time	Federal & International Tax	State & Local Tax
8:15-8:30 a.m.	**Conference kickoff** Welcome message from OSCPA and information to help you navigate your day.	
8:30-9:45 a.m.	**18. Ohio Legislative Update** TX ***Greg Saul, Esq, CAE*** *Director of Tax Policy, The Ohio Society of CPAs*	
9:45-9:55 a.m.	**Conference break**	
9:55-10:45 a.m.	**19. Economic Development Update** TX	
10:45-11:00 a.m.	**Conference break**	
11:00 a.m.-12:15 p.m.	**20. Pass-Throughs and Personal Income Update** TX ***Stephen Hall, J.D., LLM*** *Member, Zaino Hall & Farrin LLC*	
12:15-1:00 p.m.	**Lunch & trivia**	
1:00-1:50 p.m.	**23. Social Security & Retirement Update** TX ***Theresa Busher*** *Public Affairs, Social Security Administration* ***Kelly Draggoo*** *Public Affairs, Social Security Administration*	**24. State Sales Tax Update** TX ***Adam Garn, CPA, J.D.*** *Principal, Plante Moran*
1:50-2:00 p.m.	**Conference break**	
2:00-3:15 p.m.	**26. Taxation of Digital Goods** TX	**27. Sales and Use Tax Update** TX ***Damion Clifford, J.D.*** *Partner, Arnold & Clifford, LLP*
3:15-3:30 p.m.	**Conference break**	
3:30-4:45 p.m.	**30. Taxation of Marijuana** TX ***Justin Breidenbach, CPA, CFE*** *Assistant Professor of Accounting, Capital University*	

RE Regulatory Ethics

TX Taxes

18. Cont.

Tax Planning Strategies	Tax Operations & Risk Management

19. Cont

21. To be determined TX

22. Tax Risk Management TX

KPMG

25. Tax Technology TX

28. Estate, Trust Planning, Elder Law TX

Erin Eurenius, CPA, ESQ, CELA, MBA

Principal, West Side Elder Law

29. Ethics in Tax Practice RE

31. Investment Tax Strategies - Social Security TX

Aaron Lane

Financial Advisor, Edward Jones

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