

	Federal Tax	State & Local Tax
8:30-9:45 a.m.	1. Keynote - Federal Tax Outlook 2025 <i>Tony Nitti</i> Principal EY Private, Tax, National Tax Department	
9:45-9:55 a.m.	Conference break	
9:55-10:45 a.m.	2. Securities Compliance <i>Molly Brown</i> Partner Hahn Loeser	3. Hiring Remote and Mobile Workers: Challenges and Best Practices <i>Sara Goldhardt, CPA</i> Director State and Local Tax Services
10:45-11:00 a.m.	Conference break	
11:00 a.m.-12:15 p.m.	6. Federal Tax Credit Update <i>Jonathan Forman, CPA</i> GTM	7. Municipal Income Tax/RITA Update <i>Amy Arrighi, CPA</i> Executive Director Regional Income Tax Agency
12:15-1:00 p.m.	Lunch	
1:00-1:50 p.m.	10. Global / International Tax Update <i>Ian Brander, CPA</i> Dyke Yaxley, LLC	11. Mergers & Acquisitions and Liquidity Considerations <i>Debora McGraw, CPA, J.D., LLM</i> Member Zaino Hall & Farrin LLC
1:50-2:00 p.m.	Conference break	
2:00-3:15 p.m.	14. IRS Update <i>Nichelle Gray</i> IRS	15. Economic Development News for Tax Professionals <i>Rita Williams, MBA</i> Economic Development Director Zaino Hall & Farrin LLC
3:15-3:30 p.m.	Conference break	
3:30-4:45 p.m.	17. 2024 State of the Tax Professionals <i>Benjamin Vickers</i> <i>Tracy Zach</i> <i>Joe Farina</i> <i>Kara Prichard</i>	

Tax Planning Strategies	Tax Essentials
1. Cont.	
Conference break	
4. Project Management Best Practices: Thrill-em and Bill-em <i>Dave Krebs, CPA</i> Chief Visionary Officer CPA Advisory Group	5. Tax Analytics
Conference break	
8. Turn a Sales Tax Assessment into a Refund <i>Steve Dimengo, CPA, J.D.</i> Managing Partner Buckingham Doolittle	9. Business Tax Fundamentals <i>Scott Fraker, CPA</i> Fraker CPA
Conference break	
12. Cost Segregation <i>Craig Miller, CPA, CGMA, CCSP</i> President and Managing Partner Duffy and Duffy Cost Segregation	13. Tax Research <i>Mindy Nett, CPA</i> Associate Professor of Accounting Kent State University
Conference break	
15. Cont.	16. Individual Tax Fundamentals <i>Mindy Nett, CPA</i> Associate Professor of Accounting Kent State University
Conference break	
Conference break	

	Federal	State & Local Tax
8:30-9:45 a.m.	18. Ohio Legislative Update <ul style="list-style-type: none"> Greg Saul Adam Garn Jess Morgan Sara Goldhardt 	
9:45-9:55 a.m.	Conference break	
9:55-10:45 a.m.	19. Ohio Department of Tax Update <ul style="list-style-type: none"> Matt Dodovich, J.D. Attorney Ohio Department of Taxation Sarah O'Leary, J.D. Assistant Tax Commissioner and Chief Legal Counsel Ohio Department of Taxation 	
10:45-11:00 a.m.	Conference break	
11:00 a.m.-12:15 p.m.	20. COST Update <ul style="list-style-type: none"> Aziza Farooki Senior Director Council On State Taxation Fred Nicely, MBA, J.D. Senior Tax Counsel Council On State Taxation 	
12:15-1:00 p.m.	Lunch	
1:00-1:50 p.m.	23. Social Security & Retirement Update <ul style="list-style-type: none"> Theresa Busher Public Affairs Specialist Social Security Administration Kelly Draggoo Public Affairs Specialist Social Security Administration 	24. Multistate Tax Update <ul style="list-style-type: none"> Adam Garn, CPA, J.D. Principal, State and Local Tax Plante Moran Logan Linkhart, CPA State and Local Tax Senior Plante Moran
1:50-2:00 p.m.	Conference break	
2:00-3:15 p.m.	26. Medicare Update <ul style="list-style-type: none"> Theresa Busher Public Affairs Specialist Social Security Administration Kelly Draggoo Public Affairs Specialist Social Security Administration 	27. Sales and Use Tax Update <ul style="list-style-type: none"> Jeff Monsman, J.D. Director, State and Local Tax GBQ
3:15-3:30 p.m.	Conference break	
3:30-4:45 p.m.	30. Taxation of Marijuana <ul style="list-style-type: none"> Justin Breidenbach, CPA, CFE Assistant Professor Capital University 	

Tax Planning Strategies	Tax Operations & Risk Management
18. Cont.	
19. Cont.	
21. Navigating Multistate Tax Sourcing: How to avoid double taxation <ul style="list-style-type: none"> Rich Fry, J.D. Taxation Practice Group Leader Buckingham Doolittle 	22. Tax Operations and Risk Management
25. Tax Technology with AI	
28. Estate, Trust Planning, Elder Law <ul style="list-style-type: none"> Erin Eurenus - CPA, Esq., MBA, CELA Attorney West Side Elder Law 	29. The Ethical Business Case for Data Security: Key Business Risks and Opportunities for Tax Preparers <ul style="list-style-type: none"> David Myers, JD Partner Buckingham Doolittle
31. Invest In Your Financial Success with Smart Tax Planning <ul style="list-style-type: none"> Stephen Worth Clark, Schaeffer, Hackett & Co. Carl Scharf Schneider Downs 	29. Cont.