

	Federal Tax	State & Local Tax
8:30-9:45 a.m.	1. Keynote - Federal Tax Outlook 2025 TX <i>Amie Kuntz, CPA, MA</i> Partner, RubinBrown EY Private, Tax, National Tax Department	
9:45-9:55 a.m.	Conference break	
9:55-10:45 a.m.	2. Securities Compliance TX <i>Molly Brown</i> Partner Hahn Loeser	3. Hiring Remote and Mobile Workers: Challenges and Best Practices TX <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 TX <i>Jonathan Forman</i> GTM	7. Municipal Income Tax/RITA Update TX <i>Amy Arrighi, J.D.</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 TX <i>Ian Brander</i> Dyke Yaxley, LLC	11. Closely-held Business – Ohio updates and Other State Nexus Considerations TX <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 TX <i>Nichelle Gray</i> IRS	15. Economic Development News for Tax Professionals TX <i>Rita Williams, MBA</i> Economic Development Director Zaino Hall & Farrin LLC <i>Tim Parrish</i> Resolute Tax Services
3:15-3:30 p.m.	Conference break	
3:30-4:45 p.m.	17. 2024 State of the Tax Professionals TX <i>Benjamin Vickers</i> <i>Tracy Zach</i> <i>Joe Farina</i> <i>Kara Prichard</i>	

Tax Planning Strategies	Tax Essentials
1. Cont.	
4. Thrill'em and Bill'em - Bill The Right Way TX <i>Dave Krebs, CPA</i> Chief Visionary Officer CPA Advisory Group	5. Top 10 Skills for Tax Professionals TX <i>Francisco Nieves</i>
8. Turn a Sales Tax Assessment into a Refund TX <i>Steve Dimengo, CPA, J.D.</i> Managing Partner Buckingham Doolittle	9. Business Tax Fundamentals TX <i>Scott Fraker, CPA</i> Fraker CPA
12. Inside the Cost Segregation Power Play TX <i>Craig Miller, CPA, CGMA, CCSP</i> President and Managing Partner Duffy and Duffy Cost Segregation	13. Tax Research TX <i>Mindy Nett, CPA</i> Associate Professor of Accounting Kent State University
15. Cont.	16. Individual Tax Fundamentals TX <i>Mindy Nett, CPA</i> Associate Professor of Accounting Kent State University

	Federal	State & Local Tax
8:30-9:45 a.m.	18. Ohio Legislative Update <ul style="list-style-type: none"> <i>Greg Saul</i> <i>Adam Garn</i> <i>Jess Morgan</i> <i>Sara Goldhardt</i> 	
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"> <i>Matt Dodovich, J.D.</i> Attorney Ohio Department of Taxation <i>Jonathan Olszowy</i> Tax Program Executive, OH TAX Business Sponsor 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"> <i>Aziza Farooki</i> Senior Director Council On State Taxation <i>Fred Nicely, MBA, J.D.</i> 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"> <i>Theresa Busher</i> Public Affairs Specialist Social Security Administration <i>Kelly Draggoo</i> Public Affairs Specialist Social Security Administration 	24. Multistate Tax Update <ul style="list-style-type: none"> <i>Adam Garn, CPA, J.D.</i> Principal, State and Local Tax Plante Moran <i>Logan Linkhart, CPA</i> 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"> <i>Theresa Busher</i> Public Affairs Specialist Social Security Administration <i>Kelly Draggoo</i> Public Affairs Specialist Social Security Administration 	27. Sales and Use Tax Update <ul style="list-style-type: none"> <i>Jeff Monsman, J.D.</i> 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"> <i>Justin Breidenbach, CPA, CFE</i> Assistant Professor Capital University 	

Tax Planning Strategies	Tax Operations & Risk Management
18. Cont.	
19. Cont.	
20. Cont.	
21. Navigating Multistate Tax Sourcing: How to avoid double taxation <ul style="list-style-type: none"> <i>Rich Fry, J.D.</i> Taxation Practice Group Leader Buckingham Doolittle 	22. The Nuts and Bolts of an IRS Audit <ul style="list-style-type: none"> <i>Tommy Zaino, J.D.</i> Zaino, Hall, and Farrin LLC
23. Cont.	
24. Cont.	
25. Tax Technology with AI	
26. Cont.	
28. Estate, Trust Planning, Elder Law <ul style="list-style-type: none"> <i>Erin Eurenus - CPA, Esq., MBA, CELA</i> 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"> <i>David Myers, JD</i> Partner Buckingham Doolittle
27. Cont.	
31. Smart Tax Planning and Strategies – How Credits & Incentives Can Lower Your Organization’s Tax Bill <ul style="list-style-type: none"> <i>Stephen Worth</i> Clark, Schaeffer, Hackett & Co. <i>Carl Scharf</i> Schneider Downs 	29. Cont.