

	Federal Tax	State & Local Tax
8:30-9:45 a.m.	<b>1. Keynote - Federal Tax Outlook 2025</b> <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.	<b>2. Securities Compliance</b> <i>Molly Brown</i> Partner Hahn Loeser	<b>3. Hiring Remote and Mobile Workers: Challenges and Best Practices</b> <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.	<b>6. Federal Tax Credit Update</b> <i>Jonathan Forman, CPA</i> GTM	<b>7. Municipal Income Tax/RITA Update</b> <i>Amy Arrighi, CPA</i> Executive Director Regional Income Tax Agency
12:15-1:00 p.m.	Lunch	
1:00-1:50 p.m.	<b>10. Global / International Tax Update</b> <i>Ian Brander, CPA</i> Dyke Yaxley, LLC	<b>11. Mergers &amp; Acquisitions and Liquidity Considerations</b> <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.	<b>14. IRS Update</b> <i>Nichelle Gray</i> IRS	<b>15. Economic Development News for Tax Professionals</b> <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.	<b>17. 2024 State of the Tax Professionals</b> <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	
<b>4. Project Management Best Practices: Thrill-em and Bill-em</b> <i>Dave Krebs, CPA</i> Chief Visionary Officer CPA Advisory Group	<b>5. Tax Analytics</b>
Conference break	
<b>8. Turn a Sales Tax Assessment into a Refund</b> <i>Steve Dimengo, CPA, J.D.</i> Managing Partner Buckingham Doolittle	<b>9. Business Tax Fundamentals</b> <i>Scott Fraker, CPA</i> Fraker CPA
Conference break	
<b>12. Cost Segregation</b> <i>Craig Miller, CPA, CGMA, CCSP</i> President and Managing Partner Duffy and Duffy Cost Segregation	<b>13. Tax Research</b> <i>Mindy Nett, CPA</i> Associate Professor of Accounting Kent State University
Conference break	
15. Cont.	<b>16. Individual Tax Fundamentals</b> <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.	<b>18. Ohio Legislative Update</b> <ul style="list-style-type: none"> <li><i>Greg Saul</i></li> <li><i>Adam Garn</i></li> <li><i>Jess Morgan</i></li> <li><i>Sara Goldhardt</i></li> </ul>	
9:45-9:55 a.m.	Conference break	
9:55-10:45 a.m.	<b>19. Ohio Department of Tax Update</b> <ul style="list-style-type: none"> <li><i>Matt Dodovich, J.D.</i> Attorney Ohio Department of Taxation</li> <li><i>Jonathan Olszowy</i> Assistant Tax Commissioner and Chief Legal Counsel Ohio Department of Taxation</li> </ul>	
10:45-11:00 a.m.	Conference break	
11:00 a.m.-12:15 p.m.	<b>20. COST Update</b> <ul style="list-style-type: none"> <li><i>Aziza Farooki</i> Senior Director Council On State Taxation</li> <li><i>Fred Nicely, MBA, J.D.</i> Senior Tax Counsel Council On State Taxation</li> </ul>	
12:15-1:00 p.m.	Lunch	
1:00-1:50 p.m.	<b>23. Social Security &amp; Retirement Update</b> <ul style="list-style-type: none"> <li><i>Theresa Busher</i> Public Affairs Specialist Social Security Administration</li> <li><i>Kelly Draggoo</i> Public Affairs Specialist Social Security Administration</li> </ul>	<b>24. Multistate Tax Update</b> <ul style="list-style-type: none"> <li><i>Adam Garn, CPA, J.D.</i> Principal, State and Local Tax Plante Moran</li> <li><i>Logan Linkhart, CPA</i> State and Local Tax Senior Plante Moran</li> </ul>
1:50-2:00 p.m.	Conference break	
2:00-3:15 p.m.	<b>26. Medicare Update</b> <ul style="list-style-type: none"> <li><i>Theresa Busher</i> Public Affairs Specialist Social Security Administration</li> <li><i>Kelly Draggoo</i> Public Affairs Specialist Social Security Administration</li> </ul>	<b>27. Sales and Use Tax Update</b> <ul style="list-style-type: none"> <li><i>Jeff Monsman, J.D.</i> Director, State and Local Tax GBQ</li> </ul>
3:15-3:30 p.m.	Conference break	
3:30-4:45 p.m.	<b>30. Taxation of Marijuana</b> <ul style="list-style-type: none"> <li><i>Justin Breidenbach, CPA, CFE</i> Assistant Professor Capital University</li> </ul>	

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