DECEMBER 13-14, 2022

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Speaker Spotlight

Lisa Simpson, CPA
Vice President, Firm Services, AICPA

@lisatsimpsoncpa @lisasimpsoncpa

Session: Trending Tax Topics to Get You Ready for Filing Season

Lisa leads the Private Companies Practice Section (PCPS), Firm Relationship Management, Diversity & Inclusion, Young Member Initiatives, Technical Hotline and Center for Plain English Accounting. Her teams build and manage firm relationships with all size firms, promoting awareness and value, including advocating for CPA firm success and ongoing relationships with public accounting influencers.

Paige Fitzwater, CPA
Multistate Tax Services Manager, Deloitte

@paige-fitzwater

Session: Navigating the Complex World of Passthrough Entity Taxes

Paige proactively assists clients in aligning state and local tax planning with business strategies. She specializes in the real estate industry nuances including state taxation opportunities specific to REIT and fund structures. In addition, Paige is an Ohio Jurisdictional Technical Leader for Deloitte where she helps clients from all industries in managing Ohio tax controversy matters and advises upon Ohio-specific tax opportunities.

Fred Nicely, MBA, JD
Senior Tax Counsel, Council on State Taxation

@fnicely_cost @fredrick-nicely

Session: COST's Proactive Legislative Initiatives Addressing the Impact of COVID-19, OECD Global and Federal Income Tax Reforms

Fred's role extends to all aspects of the COST mission statement: "To preserve and promote equitable and nondiscriminatory state and local taxation of multijurisdictional business entities." He is a frequent speaker and author on Ohio's tax system and multistate tax issues.

Erin Eurenius, Esq., CELA®, CPA, MBA
Attorney at Law & Owner, West Side Elder Law

@erineurenius

Session: Steering the Silver Tsunami: Services for Older Adults

Erin helps seniors and individuals with disabilities and their families. Her practice focuses on elder law, estate planning, and special needs planning.

Joe Popp, JD, LLM
Principal, Director of SALT Services, Rea & Associates

@joe-popp

Session: State Tax Nexus – The Next Frontier

Joe is committed to staying on top of all state and local tax-related matters and provides extensive internal and external trainings for associations. He's also an adjunct professor at the Columbus College of Art and Design in business concepts, tax and copyright law.

Tom Zaino, JD, CPA
Managing Member & Founder, Zaino Hall & Farrin LLC

@tzaino1 @thomas-zaino

Tom assists clients with multistate business tax issues and represents companies and their executives before various state departments of revenue as well as before the Ohio Department of Tax, municipal tax authorities, Ohio Supreme Court and Ohio General Assembly. Previously, Tom served as Ohio Tax Commissioner and was a member of Governor Bob Taft's cabinet.

Nichelle Gray
Senior Tax Specialist & Stakeholder Liaison, Internal Revenue Service

Session: An IRS Update

Nichelle is responsible for communicating IRS key messages to Tax Professional, Industry and Social Services Organizations in an effort to support voluntary tax compliance. She has been with the IRS for more than 34 years.

Jessica Morgan, CPA
Senior Manager, National Tax Department, State Income Tax practice, Ernst & Young LLP

@jessicaemorgan

Session: The New Midwestern Frontier: Taxation of Foreign Income

Jessica serves businesses in tax risk mitigation and planning for state and local income tax issues across a variety of industries with a focus on consumer and industrial products. Jessica also supports the State Income Tax practice's thought leadership, brand growth, and education.

Event Details

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

2) Tax leaders focus on the nuances and hot button items for Ohio

3) Connect with over 350 tax professionals in both corporate and public accounting in prep for 2023

4) Get up to 16 TX CPE credits, CLE Pending and approved CE for EAs

December 13–14, 2022

*Register by **Nov. 15 to save $50!***

2-Day Early Registration Bundle Pricing:

☐ Non-Member	**$570**
☐ Members Price Plan	**$469**

2-Day Regular Bundle Pricing:

☐ Non-Member	**$620**
☐ Members Price Plan	**$519**

Single-day registration is also available.

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Hear from the following national and state thought leaders:

AICPA · COST Council On State Taxation · Deloitte. · EY · KPMG · Ohio Department of Taxation · Zaino Hall & Farrin LLC Attorneys at Law

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. Trending Tax Topics to Get You Ready for Filing Season** TX ***Kristin Esposito, CPA, MST*** *Director, Tax Policy & Advocacy, AICPA* ***Lisa Simpson, CPA*** *VP – Firm Services, AICPA*	
9:45-9:55 a.m.	**Conference break**	
	Federal Tax	**State & Local Tax**
9:55-10:45 a.m.	**2. Digital Asset Taxation - Current Challenges, Developments and Regulation** TX	**3. Taxation of Gambling, Marijuana, and Other Vices** TX ***Debora McGraw, JD, LLM, CPA*** *Member, Zaino Hall & Farrin LLC*
10:45-11:00 a.m.	**Conference break**	
11:00 a.m.-12:15 p.m.	**6. Current Edition: Tax-Exempt Organization Update** TX	**7. An OSCPA Legislative Update** TX ***Gregory Saul, Esq., CAE*** *Director Tax Policy, The Ohio Society of CPAs*
12:15-1:00 p.m.	**Lunch & trivia**	
1:00-1:50 p.m.	**10. Tax Impact of the Inflation Reduction Act of 2022** TX	**11. The New Midwestern frontier: Taxation of Foreign Income** TX ***Jessica Morgan*** *Senior Manager, National Tax Department, Indirect, State and Local, Ernst & Young LLP* ***Bill Nolan*** *Managing Director, Indirect Tax, Ernst & Young LLP*
1:50-2:00 p.m.	**Conference break**	
2:00-3:15 p.m.	**14. An IRS Update** TX ***Nichelle Gray*** *Senior Tax Specialist & Stakeholder Liaison, Internal Revenue Service*	**15. Sales & Use Tax Trends, Developments, and Planning Opportunities** TX ***Adam Garn, JD, CPA, MT*** *Principal, State and Local Tax, Plante Moran*
3:15-3:30 p.m.	**Conference break**	
3:30-4:45 p.m.	**17. Navigating Ohio's 2022 PIT and PTE Legislative Updates** TX ***Andrew Fernandez*** *Attorney at Ohio Department of Taxation-Tax Appeals Division*	

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TX Taxes

1. Cont.

Tax Planning Strategies	Tax Essentials
4. Maximizing the Employee Retention Credit TX ***David Cepek, CPA*** *Client Recovery Agent, ERC Application*	**5. Top 10 Skills for Tax Professionals** TX ***Francisco Nieves Jr. CPA, MST*** *Practice Leader, GTM Training Institute* ***Joanne Tempone, CPA*** *Curriculum Developer & Lead Instructor, GTM Training Institute*
8. Individual Tax Strategies TX ***Christopher J. Datino*** *Managing Director, Business Tax Services, KPMG LLP*	**9. Key Tax Fundamentals: Business** TX
12. Tax Benefits of ESG & Energy Incentives TX ***Justin Kale, CRE, CEM*** *Director, Energility*	**13. Practical Application: On the Job** TX ***Francisco Nieves Jr. CPA, MST*** *Practice Leader, GTM Training Institute* ***Joanne Tempone, CPA*** *Curriculum Developer & Lead Instructor, GTM Training Institute*
15. Cont.	**16. Key Tax Fundamentals: Individual** TX

17. Cont.

DAY 2 | 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.	**18. Tax Policy Outlook** TX	
9:45-9:55 a.m.	**Conference break**	
	Federal & International Tax	**State & Local Tax**
9:55-10:45 a.m.	**19. Economic & Business Climate Outlook** TX	
10:45-11:00 a.m.	**Conference break**	
11:00 a.m.-12:15 p.m.	**20. Navigating the Complex World of Passthrough Entity Taxes** TX ***Paige Fitzwater*** *Tax Manager, Multistate Tax Services, Deloitte Tax LLP* ***Brooke Turk, CPA*** *Tax Manager, Multistate Tax Services, Deloitte Tax LLP*	
12:15-1:00 p.m.	**Lunch & trivia**	
1:00-1:50 p.m.	**23. Social Security & Retirement Update** TX	**24. Mobile Workforce Business Obligations & Opportunities: Employees and Clients** TX ***Amy L. Arrighi*** *Executive Director, Regional Income Tax Agency*
1:50-2:00 p.m.	**Conference break**	
2:00-3:15 p.m.	**26. International Tax Strategies: Opportunities and Traps** TX	**27. State Tax Nexus - The Next Frontier** TX ***Joe Popp, J.D., LLM*** *Director of SALT Services, Rea & Associates, Inc*
3:15-3:30 p.m.	**Conference break**	
3:30-4:45 p.m.	**30. COST's Proactive Legislative Initiatives Addressing the Impact of COVID-19, OECD Global and Federal Income Tax Reforms** TX ***Fred Nicely, J.D., MBA*** *Senior Tax Counsel, Council On State Taxation* ***Aziza Farooki*** *Senior Director, Policy, Council On State Taxation*	

18. Cont.

Tax Planning Strategies	Tax Operations & Risk Management

19. Cont

21. Choice of Entity: One Size Doesn't Fit All TX

22. Knock Knock Knockin on your Door: What to do if IRS Comes to Your Door? TX

Harry-Todd Astrov, J.D.
Of Counsel, Zaino Hall & Farrin LLC

25. Steering the Silver Tsunami: Services for Older Adults TX

Erin Eurenius, Esq., CELA®, CPA, MBA
Attorney at Law & Owner, West Side Elder Law

28. Business Tax Incentives and Effective Investments TX

29. Ethics in Tax Practice RE

Vince Nardone, J.D.
Partner, Benesch Friedlander Coplan & Aronoff LLP

31. Corporate Tax Planning Stratgies TX

Matt Culp
Tax Senior Manager, Deloitte, LLP

John Bianco, CPA
Tax Senior Manager, Deloitte, LLP

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