

32nd Annual Tax Symposium

FEATURED SPEAKERS AND TOPICS

- I. **INTRODUCTION** 8:30 – 8:40
- II. **A CLIENT ASKED ME ABOUT PREPARING A FEDERAL ESTATE TAX RETURN. PSHAW! HOW HARD CAN THAT BE?** Geoffrey N. Taylor
8:40 – 8:55
- Must a return be prepared?
 - Should a return be prepared?
 - How is a return prepared?
- III. **PREPARING FOR THE CORPORATE TRANSPARENCY ACT REGULATIONS** Jordan M. Small
8:55 – 9:20
- Who is required to report, and when?
 - Conducting an analysis of reporting obligations under the new regulations
 - Preparing your clients for the CTA
- IV. **FORMS WHICH MUST BE PREPARED BY ACCOUNTANT IN CONNECTION WITH:** Stuart M. Bordman
9:20 – 9:35
- Business start up
 - Asset sale
 - Liquidation and dissolution
- Question and Answer** 9:35 – 9:45
- Break** 9:45 – 9:55
- V. **ROUNDUP OF RECENT TAX DEVELOPMENTS** William E. Sigler
9:55 – 10:35
- New Laws, Cases and Rulings
 - Hot Topics and Pending Legislation
 - Practice Pointers
- VI. **PULLING THE CAP OFF OF UNCAPPING EVENTS** Andrew M. Harris
10:35 – 10:50
- A brief overview of Proposal A tax law in Michigan
 - How to identify “Uncapping” Events under Proposal A, with a special emphasis on recent trends involving municipalities sending letters informing businesses of unforeseen “Uncapping” Events
 - How to avoid these recent “Uncapping” Events

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- VII. PAST DEATH'S DOOR – POST MORTEM TAX PLANNING** **Robert D. Kaplow**
10:50 – 11:10
- Tax elections
 - Timing of Funding and Distributions
 - Portability
- Question and Answer** **11:10 – 11:20**
- Break** **11:20 – 11:30**
- VII. HOT TOPICS IN ERCs:** **Jordan B. Segal**
IRS GUIDANCE AND MORATORIA **11:30 – 11:45**
- IRS guidance and its oversight of ERC vendors
 - How to identify the reputable ERC vendors
 - Practical effects of IRS moratorium on processing
- VIII. NONCOMPETE AGREEMENTS IN BUSINESS TRANSACTIONS** **Rita M. Lauer**
11:45 – 12:05
- The purpose of a Non-Compete Clause
 - Is a Non-Compete Clause viable and enforceable?
 - Reporting the consideration for a Non-Compete on Form 8594
- IX. 5 (OF MANY) CHANGES INCLUDED IN SECURE 2.0** **Charles M. Lax**
YOU SHOULD BE AWARE OF **12:05 – 12:20**
- What is SECURE 2.0?
 - What are the key changes that your clients and you should be aware of?
 - What new planning opportunities are now available?
- Question & Answer** **12:20 – 12:30**