

Day 1 Schedule - Wednesday, November 19 2025

Course Descriptions - Day 1

Time	Session 1	Session 2	Session 3	Session 4
7:40 AM - 10:10 AM	1011 Keynote Session You must attend this session for a full day's credit <i>Program information coming soon...</i>			
10:10 AM - 10:30 AM	Break			
10:30 AM - 12:10 PM	1021 2025 Labor and Employment Law Update: What's New and What's Next (2 CPE TAXES) (2 CLE) Glenn J. Franklin, Esq. Elana T. Henderson, Esq.	1022 Partnership Capital Accounts (2 CPE TAXES) (2 IRS CE G1U2N-T-00327-25-I) (2 CLE) Robert S. Barnett, JD, Masters (Taxation), CPA; Matthew Taus, CPA/PFS, CFP®, AEP®	1023 Income/Loss - Ordinary Capital (2 CPE TAXES) (2 IRS CE G1U2N-T-00328-25-I) Beanna J. Whitlock, EA, CSA, RTRP.	1024 Maximizing 2025 Income Tax Deductions for Commercial Real Estate Owners (2 CPE TAXES) (2 IRS CE G1U2N-T-00329-25-I) Eric P. Christenson, Cost Segregation Services, Inc.
12:15 PM - 1:15 PM (Lunch)	1031 The "5 C's" of Cybersecurity: Compliance, Change, Cost, Continuity & Coverage (1 CPE SK) Armando D'Accordo, President, CMIT Solutions of South Nassau; Robert Schlener, Director of Operations CMIT Solutions of Long Island	1032 Surprise! Your client may owe more than you think! Pitfalls and Tips for NYS and NYC audits and collection (1 CPE TAXES) (1 CLE) Yvonne R. Cort, Esq., Kate Trachtenberg, NYC Dept of Finance	1033 Discover the Value of Innovation: R&D Tax Credits Uncovered (1 CPE TAXES) (1 IRS CE G1U2N-T-00330-25-I) Brian Broussard, VP, R&D, 179D, Cost Segregation Services, Inc.	1034 Beyond the Beauty: What OBBB Really Means for Your Retirement Plan (1 CPE Advisory) (1 CFP) Mark Badami, CFP®, CLTC®
1:15 PM - 1:50 PM	Break			
1:50 PM - 3:30 PM	1041 1040 Update Part 1 (2 CPE TAXES) (2 IRS CE G1U2N-U-00331-25-I) (2 CLE) Neil D. Katz, J.D., LL.M., CPA	1042 Understanding Preparations, Compilations and Reviews (2 CPE Accounting) Alexander K. Buchholz, CPA, MBA, CGMA	1043 Navigating International Tax Changes: OBBBA & The Exit Tax (2 CPE TAX) (2 IRS CE G1U2N-U-00332-25-I) (2 CLE) Scott Ahroni, J.D., LL.M (Taxation); Andy Wang, EA, MS (Tax)	1044 Navigating FATCA Compliance: Understanding FBARs, Form 8938, and Related International Reporting Requirements (2 CPE TAX) (2 IRS CE G1U2N-T-00333-25-I) (2 CLE) Leo Gabovich, J.D., Hana Boruchov, J.D.
3:30 PM - 3:50 PM	Break			
3:50 PM - 5:30 PM	1051 1040 Update Part II (2 CPE TAXES) (2 IRS CE G1U2N-U-00334-25-I) (2 CLE) Neil D. Katz, J.D., LL.M., CPA This is a continuation of 1041	1052 NY Budget Bill/Hot Audit Issues (2 CPE TAXES) (2 CLE) Mark S. Klein, Esq., Joseph N. Endres, Esq., K. Craig Reilly, Esq.	1053 The Ugly 1040 Two (2 CPE TAXES) (2 IRS CE G1U2N-T-00335-25-I) Beanna J. Whitlock, EA, CSA, RTRP	1054 Complex K-1 Footnotes: Tax Issues and Reporting for Individuals (2 CPE TAXES) (2 CLE) Matthew Taus, CPA/PFS, CFP®, AEP®; Michele Schlereth, Esq., CPA, MST

Day 2 Schedule - Thursday, November 20 2025

Course Descriptions - Day 2

TIME	SESSION 1	SESSION 2	SESSION 3	SESSION 4
	2011	2012	2013	2014
7:45 AM - 9:25 AM	NY Budget Bill/Hot Audit Issues (2 CPE TAXES) (2 CLE) Mark S. Klein, Esq. , Joseph N. Endres, Esq. , K. Craig Reilly, Esq. Repeat of Course 1052	Credit, Credit, Whose Got a Credit? (2 CPE TAXES) (2 IRS CE G1U2N-T-00336-25-I) Bearna J. Whitlock, EA, CSA, RTRP	Alternate Designs for Defined Contribution and Defined Benefit Plans (2 CPE TAXES) (2 CFP) Stephen Abramson, CPC, CLU®, ChFC®	Update on Elder Law and Estate Planning (2 CPE TAXES) (2 CLE) (2 IRS CE G1U2N-T-00348-25-I) David R. Okrent, Esq., CPA
9:25 AM - 9:45 AM	Break			
9:45 AM - 10:45 AM	2001 Keynote - Stay Ahead of the Curve: Embracing A.I. & Technology (1 CPE Advisory) James C. Bourke, CPA, CITP, CFF, CGMA You must attend this session for a full day's credit			
10:45 AM - 11:10 AM	Break			
11:15 AM - 12:30 PM	2021 "Dude, where's the IRS?" - Dealing with the "New" IRS and Enforcement Priorities (1.5 CPE TAXES) (1 IRS CE G1U2N-T-00346-25-I) (1 CLE) Scott Ahroni, J.D., LL.M. (Taxation) , Larry Sannicandro, J.D., LL.M. (Taxation)	2022 Multi-Method Investing Financial Markets Update (1.5 CPE SK) Jesse Mackey, Chief Investment Officer, 4Thought Financial Group Inc.	2023 Beyond 183 Days: Understanding NY's Aggressive Tax Residency Rules (1.5 CPE TAXES) (1 CLE) Marisa Friedrich, J.D., Moshe Zupnick, J.D.	2024 The A.I. Advantage: Scaling Smarter, Faster, and Stronger (1.5 CPE SK) Dan Fusco
12:30 PM - 12:45 PM	Break			
12:45 PM - 1:40 PM (Lunch)	2031 Living Longer, Spending Smarter: LTC Insurance in the New Retirement Reality! (1 CPE SK) Natalie Karp & Rona Loshak, Karp Loshak LTC Insurance	2032 Tax True or False? Test Your Tax Knowledge (1 CPE TAXES) (1 CLE) Robert S. Barnett, JD, Masters (Taxation), CPA Matthew Taus, CPA/PFS, CFP® AEP®	2033 The Times They Are a-Changing (1 CPE TAXES) (1 IRS CE G1U2N-T-00344-25-I) (1 CLE) Scott L. Kestenbaum, Esq. , Karen Kelly , Neil Cohen, CFE, EA	2034 NYSDTF: Tax Updates and Department Messages (1 CPE TAXES) Christopher Meislahn, Taxpayer Rights Advocate, NYSDTF
1:40 PM - 1:55 PM	Break			
1:55 PM - 3:35 PM	2041 1040 Update Part I (2 CPE TAXES) (2 IRS CE G1U2N-U-00331-25-I) (2 CLE) Neil D. Katz, J.D., LL.M., CPA Repeat of Course 1041	2042 Current Developments in NJ/CT Taxation (2 CPE TAXES) (2 CLE) New Jersey Tax Update Chaim Kofinas, CPA Connecticut Tax Update David Q. Bigger, Esq.	2043 Smarter on Social Security: Strategies to Optimize Spousal & Survivor Benefits (2 CPE SK) Daniel G. Mazzola, CFA, CPA, CFP®	2044 Contemporary Topics in A & A (1 CPE Auditing and 1 CPE Accounting) Alexander K. Buchholz, CPA, MBA, CGMA
3:35 PM - 3:55 PM	Break & Exhibitor Raffles			
3:55 PM - 5:35 PM	2051 1040 Update Part II (2 CPE TAXES) (2 IRS CE G1U2N-U-00334-25-I) (2 CLE) Neil D. Katz, J.D., LL.M., CPA This is a continuation of program 2041 Repeat of Course 1051	2052 The Sales Tax Buffet: An Apple to Zucchini Recipe for Sales Tax on Food and Handling Restaurant Audits (2 CPE TAXES) (2 CLE) Mark L. Stone, CPA, MST , Joseph Calamia II, CPA , Jennifer L. Koo, Esq.	2053 QSBS Common Mistakes and Misconceptions (2 CPE TAXES) (2 IRS CE G1U2N-T-00337-25-I) (2 CLE) Matthew E. Foreman, J.D., LL.M. (Taxation)	2054 Common Private Company Engagement Deficiencies (1 CPE Accounting) (1 CPE Auditing) Renee Rampulla, CPA, CGMA

Day 3 Schedule - Friday, November 21 2025

Course Descriptions - Day 3

TIME	SESSION 1	SESSION 2	SESSION 3	SESSION 4
7:45 AM - 9:25 AM	3011 Tax Issues in Elder Care and Supplemental Needs Planning 2025 (2 CPE TAXES) (2 CLE) (2 IRS CE G1U2N-T-00338-25-I) Stuart H. Schoenfeld, Esq. , Robert S. Barnett, JD, Masters (Taxation), CPA	3012 Estate Tax Planning for the Middle Wealthy (2 CPE TAXES) (2 IRS CE G1U2N-T-00345-25-I) (2 CLE) Neil D. Katz, J.D., LL.M., CPA , Alyssa Danziger, J.D.	3013 NYS Residency and Nonresident Allocation Hot Topics (2 CPE TAXES) (2 CLE) Joseph N. Endres, Esq.	
9:25 AM - 9:45 AM	Break			
9:45 AM - 11:25 AM	3021 Tax Issues with Distressed Real Estate (2 CPE TAXES) (2 CLE) (2 IRS CE G1U2N-T-00339-25-I) Matthew E. Rappaport, Esq., LL.M. (Taxation)	3022 S & C Corporation Update (2 CPE TAXES) (2 IRS CE G1U2N-U-00340-25-I) (2 CLE) Robert S. Barnett, JD, Masters (Taxation), CPA	3023 Standards Update Simplified: What Small Firms Need to Know (2 CPE Auditing) Matthew Gerberg, CPA ; Alexis Schneider, CPA	3024 TBD
11:25 AM - 11:55 AM	Break			
11:55 AM - 12:50 PM (Lunch)	3031 Tax Planning 2025 (1 CPE TAXES) (1 CLE) Mark E. Wilensky, Esq. , Meltzer Lippe Goldstein & Breitstone, LLP	3032 Managing Sequence of Returns Risk with Home Equity (1 CPE SK) Robert Tollin, CRMP, CDLP	3033 Estate Timeline for CPAs (1 CPE TAXES) Gregory L. Matalon, Esq.	3034 Proactive Exit Planning for Business Owners (1 CPE SK) Steven Tambone, CFP®, CEPA®
12:50 PM - 1:05 PM	Break			
1:05 PM - 2:20 PM	3041 Artificial Intelligence: A Comprehensive Panel Discussion (1.5 CPE TAXES) (1 CLE) Matthew E. Rappaport, Esq., LL.M. (Taxation) ; Kenneth J. Falcon, Esq. ; James M. Black II, Esq.	3042 Bridging the Gap: How New York Lawyers and CPAs Can Collaborate on Effective Medicaid Planning (1.5 CPE TAXES) (1 CLE) (1 IRS CE G1U2N-T-00341-25-I) Aaron Futterman, CPA, Esq.	3043 Circular 230 – Rules and Best Practices for Tax Return Positions, Interacting with the IRS, and Assisting Clients with Past Non-Compliance (1.5 TAX) (1 IRS CE G1U2N-T-00342-25-I) Megan L. Brackney, J.D., LL.M. (Taxation)	3044 TBD
2:20 PM - 3:05 PM	Break			
3:05 PM - 4:20 PM	3051 1031 Exchange Advanced Issues Explained: Related Parties, Identification, Expenses and Recent Case Law (1.5 CPE TAXES) (1 CLE) (1 IRS CE G1U2N-T-00343-25-I) Eric Brecher, Esq., CES®	3052 Tax and Financial Aspects of Elder Law (1.5 CPE TAXES) (1 CLE) Matthew E. Rappaport, Esq., LL.M. (Taxation) ; Michele Schlereth, Esq., CPA, MST ; Ashley R. Arcuri, Esq.	3053 Client Management for Firm Efficiency (1.5 CPE Advisory) James E. Hall, CPA, CEPA ; Andrea Parness, CPA ; Sandra G. Johnson, CPA, EA, CFE	