

2019 LONG ISLAND TAX PROFESSIONALS SYMPOSIUM

Symposium

November 20, 21, 22

Exhibits

November 20, 21

E-Commerce Day

November 22

seminars & schedules

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2019 Long Island Tax Professionals Symposium

WELCOME to the 17th Annual Long Island Tax Professionals Symposium.

On behalf of the Nassau/Suffolk Chapter of nccpap, The Education Foundation of the National Conference of CPA Practitioners-Nassau/Suffolk Chapter, and all of our co-sponsors, I would like to thank each and every one of you for making this event the premier event in the tri-state area for tax and accounting professionals.

Once again, you will have the opportunity to earn up to 28.5 CPE credits. After one of the most challenging years our profession has faced, you will have the opportunity, once again, to sharpen your skill set, and share your experiences with your colleagues.

Don't forget to stop by and see our vendors and learn about all the great tools and resources they can provide! Sit up and enjoy the show!

Robert N. Brown, CPA
President of the N/S Chapter of nccpap

SYMPOSIUM BENEFITS

- + IRS Case Resolution & NYS Case Resolution Rooms
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- + Exhibit Floor "Beach Party" Networking / Cocktail Event on Wednesday

Nassau/Suffolk Chapter nccpap
22 Jericho Turnpike, Suite 110,
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Once again, The Nassau/Suffolk Chapter and the Education Foundation is replacing the J. K. Lasser publication with THE TAX BOOK – a very highly rated professional tax resource book.

We are hoping that you will truly benefit from using the publication and will get many, many years of, can we say, ENJOYMENT (?) out of its use.

Please note that because THE TAX BOOK is published with the absolute MOST CURRENT information available before tax season commences, the book is not available until Mid-DECEMBER. As such, you will not receive the book at the Symposium – YES, this means that you do NOT have to carry it around during the day. The book will be shipped DIRECTLY TO YOU ON OR ABOUT DECEMBER 15, 2019!

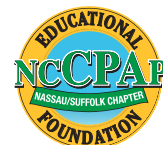
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THE LONG ISLAND TAX PROFESSIONALS SYMPOSIUM IS A GREAT NETWORKING OPPORTUNITY

Where you can connect and establish a strategic relationship with allied professionals.
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HOW TO REGISTER

Register on www.LITPS.org.
Choose your courses on page 11 and fill out form on page 10.
(Add \$45 to registration fee if faxed.) 516-997-5155.



PROFESSIONAL CREDITS

Attendance at these seminars can qualify for up to 28.5 Continuing Professional Education (CPE) credits. For a listing of CPE (subject to change upon approval), please see details at litps.org.



THE EXHIBITION FLOOR

Attend the exhibit area where key vendors display their products and hold special events. Don't forget your business cards for the exhibitor raffles.



IRS CASE RESOLUTION

Representatives from the Taxpayer Advocate will be available on Wed., 11/20 9am-3:30pm, and Thurs., 11/21, 8am-3:30pm in the IRS Practitioner Case Resolution Room to assist practitioners with their most difficult case. Registered Symposium attendees will be allowed one appt only. Appts. need to be made in advance. No appts during designated lunch sessions. Practitioners must have the intake form completed and a copy of the valid Form 2848. (Forms are available on litps.org.) Also, on Thurs., 11/21 only, representatives from IRS' Automated Collection Systems (ACS), Practitioner Priority Service (PPS), and the PTIN Renewal Unit will provide assistance via dedicated phone lines. Appt. from 9am-3:30pm, can be scheduled in person on Wed, 11/20.



NYS CASE RESOLUTION

Representatives from the Audit Division and Collections and Civil Enforcement Division with specialized experience will be available to meet one-on-one with tax practitioners to discuss individual client tax cases and assist with resolution. You must have a Power Attorney filed with the Department authorizing disclosure of confidential client tax information. If the case cannot be resolved at the Symposium and requires further research, it will be assigned to an appropriate New York State Tax Department expert for follow-up.



E-COMMERCE DAY

Software, Hardware Solutions, Apps and more.



THE ELECTRONIC AGE... SEMINAR MATERIALS ACCESS

All presentations will be available for downloading at www.litps.org by Monday, November 12. We suggest all attendees download at least their first day seminar course materials prior to arrival at Crest Hollow.



NASSAU ACADEMY OF LAW

The Nassau Academy of Law will issue credits for a fee of \$30/each. Please be sure to place your total on the payment page and include with your payment. (See page 10.)

THE SEMINARS

Please note that seating is extremely limited
DON'T BE LEFT OUT – REGISTER EARLY

IRS representatives, NYS tax representatives, tax professionals and other subject matter experts will present all seminars. The Seminar sessions will cover many of the late-breaking tax issues as well as updates for the 2019 filing season.
All speakers are subject to change without notice.



• **GO.NCCPAP is everything nccPAP.** You can see your contacts, library, discussion groups, your communities and everything on the web-site. (Download from Google Plus or iTunes. Type NCCPAP)



• **NEST-NCCPAP This app is your companion at the show.** View all class materials, your schedule, verify your attendance, get maps, receive real time announcements, view pictures and tweet from your seat! (Download from Google Plus or iTunes. Type NCCPAP)

CREST HOLLOW COUNTRY CLUB

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516-692-8000, www.cresthollow.com
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ABOUT PHOTOS AND VIDEOS

Parts of the Long Island Tax Symposium are being recorded, both audio and video, and photographed. The media captured may be used for commercial and marketing purposes. By registering for the symposium, you are giving consent to the use of any image or recording that may contain your likeness.

2019 Long Island Tax Professionals Symposium

DAY ONE | 11.20.19

SCHEDULE AT A GLANCE

7:00am-7:40am Registration & Breakfast
7:00am-7:00pm Exhibit Area Open
8:00am-4:30pm Case Resolution Room
7:40am-10:10am Keynote Speakers

10:10am-10:30am Morning Break
10:30am-12:10pm Concurrent Sessions
12:15pm-1:15pm Lunch
1:15pm-1:50pm Afternoon Break

1:50pm-3:30pm Concurrent Sessions
3:30pm-3:50pm Afternoon Break & Exhibitor Raffles
3:50pm-5:30pm Concurrent Sessions
5:30pm-7:00pm Cocktail Party

Attendance is Mandatory for FULL Day Credit

Course: 1011



KEYNOTE SESSION

Update on the Activities and Priorities of the NYS Department of Taxation and Finance (1.5 CPE TAX)

Commissioner Michael R. Schmidt, NYS Department of Taxation and Finance

Keeping Current in Changing Regulatory Times (1.5 CPE TAX)

Jennifer B. Winters, Executive Secretary, NYS Education Department

The Executive Secretary to the State Board for Public Accountancy, Jennifer Winters, will discuss the past, present, and future state of the evolving regulatory environment.

You must attend this session for a full day's credit

Course: 1021

Current Developments in Preparations, Compilations, and Reviews (A & A CPE)

Frank A. Gallo, CPA, Edward P. Caine, MBA, CPA, CFF, CITP, CGMA

We will review the SSARS Standards and discuss how these standards affect your practice. Discuss when the accountant is engaged to prepare financial statements, but not engaged to perform an audit, review or compilation. We will provide practical examples that can be immediately used. Discuss documentation requirements for compilations, review prospective and proforma financial statements. Discuss reporting requirements on compiled reviewed or prepared financial statements. Included will be a discussion on the latest Peer review requirements in NYS and PA.

Course: 1022

IRS Collections & Appeals – Working Together for Alternative Resolutions (1 TAX CPE) (CLE) (1 IRS CE)

Kristen Bailey, Director, Collection Appeals, IRS Independent Office of Appeals;

Scott Reisher, Director, Campus Collection

Panelists consisting IRS Collection and Appeals representatives along with a practicing Tax Attorney, will discuss Collection Appeals Hearing process with a focus on Collection Due Process, Collection Appeals Program and Offers in Compromise.

IRS/Small Business-Self-Employed Operating Division Program Goals & Objectives for Tax Compliance (1 TAX CPE) (1 IRS CE)

Scott Reisher, Director, Campus Collection

Insights into SB/SE's 2020 priorities and the role that education, technology and data analytics will play.

Course: 1023

NYS Sales Tax Audit & Tax Collection Issues (TAX CPE) (CLE) (CFP)

Karen J. Tenenbaum, Esq., LL.M. (Tax) CPA

When restaurant owners don't pay their taxes, NYS comes after their business and sometimes, come after them personally. Learn about collection alternatives and tactics and strategies to avoid the closure of your restaurant from a distinguished panel of attorneys who handle NYS Tax Collection issues every day.

Course: 1024

401(k) Plans: Fiduciary Issues, Remitting Deferrals, and Auto-Enrol Pros and Cons (TAX CPE) (CLE) (CFP)

Stephen Abramson, CPC, CLU, ChFC

This session will cover several related issues as indicated above. In one way or another these topics are key in protecting your clients from fiduciary litigation which is widespread in 401(k) plans of various sizes as measured by plan assets. These class action proceedings focus on plan/fund expenses, use of revenue sharing, use of proprietary funds among others. Join us to get the details.

Recently a case was settled for \$55 million not including the legal fees paid by the plan sponsor of approximately \$42 million over more than 10 years.

Course: 1025

199A Demystified (TAX CPE) (CLE) (2 IRS CE) (CFP)

Beanna J. Whitlock, EA, CSA, RTRP

2019 filing season was one we all "hoped" our tax software was correct. The journey of the 199A from the Tax Cuts and Jobs Act is treacherous and one must be clear on the elements of Qualified Business Income, Unadjusted Basis in Assets and other issues to secure the 20% reduction in taxable income.

Added to the complexities of the 199A are the application to rental property. From the trade or business determination to the 250-hour safe harbor rule, tax professionals must get it right for their clients.

The presentation will confirm what you know, add to your knowledge and give you confidence in this most complex of tax issues.

Course: 1026

Real Estate Tax Deductions That Most Tax Professionals Are STILL Missing For Their Clients (TAX CPE) (CLE)

Eric P. Christenson, Cost Segregation Services, Inc.

During this program, we will go over:

- Capital to Expense Reversal
- Asset Disposition
- Ratio Test for medium to large expensing decisions?

We will review these valuable tax deductions that are slipping past your clients

Course: 1031

Lunch Program

1041 & TCJA (1 TAX CPE) (1 CLE) (1 CFP)

Robert S. Barnett, CPA, Esq., Gregory L. Matalon, Esq.

Income taxation of Trusts and Estates has become more complicated after the TCJA. We will review various considerations affecting taxation including: Basis considerations; Section 754 elections; DNI calculation and new considerations for planning; Utilization of Beneficiary tax brackets; Section 199A planning and anti-abuse regulations. Time permitting, we will include qualified disclaimers and other tax elections as well as a mention of GST planning benefits.

Course: 1032

Lunch Program

Financial Literacy for the Next Generation (1 MAP CPE)

Karen Tenenbaum, Esq. LL.M. (Tax), CPA;

Rich Weinstein, Co-founder, Money Masters, Inc.

Wouldn't it be great we if could teach young children about money the same way we teach them ABC's and 123's? And what better gift for the future is there than to help them value and be responsible for what their parents work so hard for? Learn more about how you can teach children about financial literacy.

Course: 1033

Lunch Program

Alternative Investments (1 Tax CPE) (1 CLE) (1 CFP)

Corey Stein, Senior VP, Financial Advisor, Portfolio

Mngmnt. Director, Morgan Stanley Wealth Management
Alternative Investments have the potential to help lower volatility and increase returns, diversification and potentially be tax beneficial in a client's portfolio. Qualified Opportunity Zones, 1031 Exchanges, and other tax credit and tax deferred investments and how they work and taxable consequences. We will discuss the potential for suitable investments for the right investor; Hedge Funds, Managed Futures, Private Real Estate Funds, Private Equity Funds, Exchange Funds, Private Placement offerings, Private Credit Funds.

*Morgan Stanley does not give taxable advice. We recommend tax questions be directed to a Professional CPA.

Course: 1034

Lunch Program

Are You a QBO Hero? (1 SK CPE)

James N. Filicetti, CPA

The switch is on from any accounting software to QuickBooks Online. In this interactive session, learn how to seek knowledge in understanding the depth and breadth of the conversion process among any Software and QB Online. Learn proven methods from your peers to make you and your firm more profitable by adopting workflows you will want to know. Are you the next QBO Hero to your clients?

2019 Long Island Tax Professionals Symposium

Course: 1035

Lunch Program

Estate and Elder Plans for the Other 99½ Percent of Us (1 SK CPE) (1 CFP)

Gary H. Friedenberg, CPA, Esq., and Moss J. Kaufman CFP®, EA, CLTC

We live in a changing financial environment. Middle class incomes can be considered earners of a half million dollars a year. Thanks in part to a strong real estate market and investment returns. A middle-class estate can be anywhere from a half million to ten million dollars. Gary H. Friedenberg, CPA, ESQ and Moss J. Kaufman CFP®, EA, CLTC have teamed up to discuss how they have solved challenges and problems that a large number of families and entrepreneurs will encounter today and 50 years' worth of tomorrows.

Course: 1041

1040 Update Part 1 (TAX CPE) (CFP) (CLE) (2 IRS CE)

Neil D. Katz, J.D., LL.M., CPA

This presentation will focus on the changes that affect the preparation of the 2019 Form 1040, including a complete discussion of the aftermath of the Tax Cuts and Jobs Act and the recent guidance that has been issued to address these and other provisions. In addition, there will be a discussion of the latest case law, rulings and other current developments that affect the 2019 tax year.

This program continues at 1051 and repeats at 2041

Course: 1042

Roadblocks in M&A and How to Avoid Them (TAX CPE)

William Carlino, Transition Advisors

If there are 50 things to think about in a merger, the smartest of us will think of at most 35. Any merger can be fraught with unexpected hurdles and complex issues – but the key to overcoming them is knowing what to look for and what to do when an issue comes front and center. In this session attendees will learn:

- Identifying common M&A roadblocks and how to avoid them
- Determining what are the “must haves” in any deal
- What does equity mean?
- Why time kills all deals
- What are changes behind the door and in front of the door?
- Why it's critical to review your partnership agreement prior to a deal
- Strategies to develop party unity

Course: 1043

Long Term Care Consequences Are Real. What Is Your Plan? (TAX CPE) (CFP)

Natalie Karp, MBA, CLTC, Rona Loshak, MBA, CLTC

A discussion of the most up to date long term care insurance solutions to protect lifestyle and legacy given the looming long term care crisis facing all of us.

Enhance revenue and relationships. Learn how to leverage dormant assets; convert tax hostile money to tax free money and use government incentives to finance LTC premiums.

Course: 1044

2019 State and Local Tax Update: State Responses to TCJA, Wayfair, Kaestner and Beyond (TAX CPE) (CLE) (CFP)

Harlan J. Kwiatek, CPA, JD, LL.M., CPA

This session will provide an update and analysis of the major developments in state and local taxes during 2019, including states' responses to TCJA (with a focus on Connecticut's Pass-Thru Entity Tax, New Jersey's and New York's responses to the TCJA) and the U.S. Supreme Court's decisions in *South Dakota v. Wayfair* and *North Carolina Department of Revenue v. Kimberley Rice Kaestner 1992 Family Trust*.

Course: 1045

Taxpayer First Act (TAX CPE) (CLE) (2 IRS CE) (CFP)

Beanna J. Whitlock, EA, CSA, RTRP

Not since 1998 has there been such a wide-reaching requirement on the Internal Revenue Service and how it restructures into an agency offering taxpayer assistance. Be aware of the new requirements of the IRS, several already implemented, and how practice before the IRS will change for tax professionals and the taxpayers they serve.

Course: 1046

Estate Planning, Trusts, Asset Protection and Medicaid Myths (TAX CPE) (CLE) (CFP) (2 IRS CE)

Donna M. Stefans, Esq.; Marilyn Stefans, CFP, E.A., Henry Grabkowitz, E.A.

Discussion will explore various types of trusts, estate planning documents, Durable Power of Attorney and Medical Directives. It will include insights and practical information for taxation, gifting pitfall and Medicaid myths of asset protection.

Course: 1051

1040 Update Part 2 (TAX CPE) (CFP) (CLE) (2 IRS CE)

Neil Katz, J.D., LL.M., CPA

This is a continuation of Course 1041

Repeats at 2051

Course: 1052

New York's Response to TCJA and Other Hot Topics (TAX CPE) (CLE) (CFP)

Mark S. Klein, Esq., Joseph N. Endres, Esq.

This seminar will cover the latest developments in New York State's 2019-2020 budget bill, including NY's response and implementation of the TCJA. We will discuss the SALT cap workarounds, while also highlighting new decisions, rulings, and administrative releases affecting New York's personal income, sales, and corporate taxes, as well as the impact of recent Tax Department and Attorney General enforcement initiatives. Finally, we will review various tax incentive programs, as well as recent changes in New York's Abandoned Property law and enforcement.

Repeats at 2011

Course: 1053

Asset Protection Planning for Accountants, Doctors, Lawyers, and Other Vulnerable Professionals (TAX CPE) (CLE) (IRS CE)

Matthew E. Rappaport, Esq., LL.M. (Taxation)

This program will describe techniques for clients in sensitive businesses, particularly those requiring a professional license, to legally and effectively protect their assets from unknown and unanticipated future credi-

tors. For accountants, with so much to watch out for in the wake of the TCJA, asset protection planning should be of particular interest.

Course: 1054

Candid Presentation of the Workings of the IRS and How to Utilize That Knowledge to the Benefit of Your Clients (TAX CPE) (2 IRS CE)

Howard M. Silverman, Retired IRS Revenue Agent / Team Coordinator, Examination Division

Walk thru of the examination process, from the smallest most basic to the largest, including public companies, and high wealth individuals. The process of each type will be covered, discussing the differences, by IRS division and size and type of examination.

We will touch up each step, what can be expected, general preparation tips, agent's responsibilities, information document requests, examination report, appeals rights and procedures, specialist assignments, Joint Committee and collateral examinations.

Course: 1055

Special Needs Throughout a Lifespan (TAX CPE) (CLE)

Kim M. Smith, Esq., Kim Smith Law Group, LLC.; Bonnie Spiro Schinagle, Esq., Law Offices of Bonnie Spiro Schinagle; Sandra Gumerove, Esq., Sandra M. Gumerove & Associates

The practice of elder law encompasses a broad array of issues such as Medicaid and asset protection planning; long-term care and nursing home care; and the use of Estate planning documents. This program will educate you on the basics of Community Medicaid for Home Care, and Chronic Medicaid for Nursing Home Care for individuals with needs. This presentation also introduces the basic framework of the Individuals with Disabilities in Education Act, including how students qualify for protection and the rights conferred.

Course: 1056

Can You Still Find a Successor Who Will Pay You for Your Accounting Practice? (TAX CPE) (CLE)

Max T. Krotman, Esq.

Yes, we can. It is not as easy as it was 20 years ago. There are fewer qualified individual successors looking for practices. Look around you. How mature are your fellow practitioners? The reservoir of entrepreneurial accountants continues to shrink each year. But fortunately, local firms are able to leverage the time of its partners by increased computer infrastructure and paying its staff much more than years ago and allowing part time work and remote work.

Staff likes to come to work at 9:00 and leave at 5:00 on the button and enjoy life. Work/Life balance interferes with entrepreneurship. Still, for the moment, every good practice can find a successor.

There will plenty of interactive time for questions and shared experiences.

2019 Long Island Tax Professionals Symposium

DAY TWO | 11.21.19 SCHEDULE AT A GLANCE

7:00am-7:40am	Registration & Breakfast	9:45am-10:45am	Keynote Speaker -	1:40pm-1:55pm	Afternoon Break
7:00am-3:55pm	Exhibit Area Open	Attendance is Mandatory for FULL Day Credit		1:55am-3:35pm	Concurrent Sessions
8:00am-4:30pm	Case Resolution Room	10:45am-11:00am	Morning Break	3:35pm-3:55pm	Afternoon Break
7:45am- 9:25am	Concurrent Sessions	11:00am-12:30pm	Concurrent Sessions		& Exhibitor Raffles
9:25am-9:45am	Morning Break	12:40pm-1:40pm	Lunch	3:55pm-5:35pm	Concurrent Sessions

Course: 2001

KEYNOTE SESSION

Charles P. Rettig is the 49th Commissioner of the IRS. As Commissioner, Mr. Rettig presides over the nation's tax system, which collects approximately \$3.4 trillion in tax revenue each year. This revenue funds most government operations and public services. Mr. Rettig manages an agency of about 80,000 employees and a budget of approximately \$11 billion. In leading the IRS, Mr. Rettig is focused on improving service to the nation's taxpayers, balancing appropriate enforcement of the nation's tax laws while respecting taxpayer rights.

You must attend this session for a full day's credit



Course: 2011

New York's Response to TCJA and Other Hot Topics (TAX CPE) (CLE) (CFP)

Mark S. Klein, Esq., Joseph N. Endres, Esq.

This seminar will cover the latest developments in NYS's 2019-2020 budget bill, including NY's response and implementation of the TCJA. We will discuss the SALT cap workarounds, while also highlighting new decisions, rulings, and administrative releases affecting New York's personal income, sales, and corporate taxes, as well as the impact of recent Tax Department and Attorney General enforcement initiatives. Finally, we will review various tax incentive programs, as well as recent changes in New York's Abandoned Property law and enforcement.

This is a repeat of Course 1052

Course: 2012

Accounting & Auditing Update (A & A CPE)

Alexander K. Buchholz, CPA, MBA, CGMA

Learn about recent and upcoming accounting and auditing developments. In this session, you will take a deeper dive into new and proposed accounting and auditing standards. Topics include the revised lease accounting standards update, financial statement revisions for not-for-profit entities, accounting for contributions received and made, revenue recognition standards, and other important accounting and auditing standards.

Course: 2013

Divorce - Litigation vs. Collaborative Resolution vs. Mediation (CFP) (CLE)

Donna E. LaScala, RFC, Elizabeth Vaz, Esq., and Nannette Watts, CPA

A panel discussion including an attorney, CPA, financial professional and mental health professional, all trained in each discipline, who will discuss the advantages and disadvantages of each method. This breakout session will also include a case study with roll play to demonstrate the differences of each approach.

Course: 2014

IRS Updates and Cybersecurity (TAX CPE) (2 IRS CE)

Beanna J. Whitlock, EA, CSA, RTRP

Learn the changes at the IRS that impact your practice. Review what IRS.gov makes available to the tax professional to assist you in your service to America's taxpayers.

It is not a matter of if, but of when, a scammer/hacker will access your client information. Tax professionals are a treasure trove of coveted information for a security thief. Learn what the IRS requires of tax professionals to secure their client data and what tools are available out there to assist us to protect our taxpayers and therefore ourselves.

Course: 2015

Getting Uncle Sam Out of Your Retirement. Tax Advantaged Distribution of Your Qualified Money (TAX CPE) (CLE) (CFP)

Mary Read, CPC, CPFA, QPA

There is currently \$29.1 Trillion waiting to be taxed in qualified accounts like IRAs and 401(k)s. Your clients have some of this money. The currently proposed SECURE Act will speed up the tax on these funds by eliminating the stretch IRA for beneficiaries. In this session learn about a way to significantly reduce the tax bill on these funds and leverage for greater benefits. We will explore real life cases to see the impact you might be able to have for your clients.

Course: 2016

Current Developments in CT/NJ Taxation (TAX CPE) (CFP) (CLE)

Alan J. Preis, CPA, P.C. and Louis Schatz, Esq.

This seminar will review recent Connecticut tax developments, including legislative, judicial, and administrative changes. Particular emphasis will be placed on recent changes to CT's new pass-through entity tax, an update of CT's legislative responses to the Federal Tax Cut and Jobs Act, as well as changes to the CT sales tax laws following the Supreme Court's decision in Wayfair. NJ discussion will include: current developments in NJ corporation business tax, sales and use tax and personal income with specific attention to: New 2019 corporate combined reporting; new 2019 corporate market sourcing for receipts from services (including CPA corporations); proposed NJ legislation requiring federal/state conformity for S corps.; proposed 2020 NJ initiative for streamlined dissolution of corporations and streamlined reinstatement of corporations with voided charters; NJ Wayfair adoption-11/1/18 effective date.

Course: 2021

IRS Audit & Tax Collection Issues (1.5 TAX CPE) (1.5 CLE) (1 IRS CE)

Karen Tenenbaum, Esq., LL.M. (Tax), Hana Boruchov, Esq.
Are your clients being contacted by the federal taxing authorities for amounts owed? Hear the latest tax enforcement updates from experienced tax attorneys who handle tax controversies and disputes. Learn about collection tools and tactics used by the IRS, as well as collection alternatives and payment options for taxpayers.

Course: 2022

Can You Reduce My Taxes, Please? (1.5 TAX CPE) (1.5 CFP)

Paresh Shah CFP®

These 15 financial planning strategies help your client save, eliminate or defer income, estate and / or capital gain taxes. With yearend 2019 round the bend, this may just be the ideal time to get some of these under the belt for your client.

Course: 2023

What You Really Need to Know About IRAs (1.5 TAX CPE) (1.5 CFP)

Daniel G. Mazzola, CFA, CPA, CFP and John A. Baldi MBA, PFS, CPA

Not understanding the rules and nuances of IRAs can result in thousands of dollars lost and planning opportunities missed. This presentation will cover basic concepts such as income limitations as well as examining overlooked and unsung vehicles such as back door Roth IRAs, Health Savings Accounts and the solo 401 (k).

Course: 2024

1031 Exchanges after TCJA (1.5 TAX CPE) (1.5 CLE) (1.5 CFP) (1 IRS CE)

Beanna J. Whitlock, EA, CSA, RTRP

The Tax Cuts and Jobs Act made a major change to the qualification of a §1031 Exchange. For years 2018 through 2025 the exchange can only be of real property. Learn what is and what is not real property. The difference between §1250 and §1245 can result in income to your taxpayer, often unexpected income. Is cost segregation still a valid tool for taxpayers with real property? Is there an ability to avoid tax on the property not qualifying for the exchange? Learn the answers and much more.

Course: 2025

Mitigate Cyber Threats with Strong Data Protection (1.5 SK CPE)

Armando D'Accordo, President, CMIT Solutions

Have you read IRS Publication 4557?

In today's dangerous online world, hackers target everyone – even small businesses. Even if you've never had a virus or think you're completely protected, you could still get caught with your defenses down. This session will cover how to protect your business and your client data.

Course: 2026

Important Wage and Hour Law Changes on the Horizon & DOL Audits (1.5 CPE TAX) (1.5 CLE)

Andrew A. Kimler, Esq., Irv Miljone, retired District Director, U.S. Dept. Of Labor/Wage and Hor Div./Long Island District Office

We will examine DOL audits and new rules regarding the salary threshold for white-collar OT exemptions and for determining joint employer wage liability. Misclassification rulings will also be reviewed as well as State court decisions regarding the importance of maintaining records.

2019 Long Island Tax Professionals Symposium

Course: 2031

Lunch Program

Secure Act IRA Planning (1 TAX CPE) (1 CLE) (1 CFP)
Robert S. Barnett, CPA, Esq., Gregory L. Matalon, Esq.
Is it safe??? We were all secure with our traditional IRA and annuity planning UNTIL NOW! Hear how the new proposals will affect planning and how to maximize benefits. We will include speakers to address different planning options.

Course: 2032

Lunch Program

Challenging an Assessed Tax (1 TAX CPE) (1 CLE) (1 IRS CE)

Yvonne R Cort, Esq. and Noelle Geiger, Esq.
What if your client thinks he does not owe the tax? We will discuss options to open previously closed IRS and NYS assessments, reducing the balance to the correct amount, or sometimes in full. The audit may be closed, or your client missed the deadline; but there may still be ways to move forward. We will look at different tools & how to assist your client.

Course: 2033

Lunch Program

The R&D Tax Credit & Business Incentives: Leveraging Technology & Data (1 TAX CPE)

Vaqaar Khan, Director, Tax Credits, ADP Brandi Price, Esq., Senior Tax Manager, Tax Credits, ADP
This presentation will provide a strategic overview of the evolving tax incentive landscape, highlighting key programs and providing insight into the latest tools & techniques being leveraged in the market. We'll also cover impact of Tax Reform (TCJA 2017) on tax incentives and other relevant topics on the minds of taxpayers.

Course: 2034

Lunch Program

What Happened To 15 Year Qualified Property, Bonus Depreciation and Section 179 and What To Do About It (1 TAX CPE)

Chris Hitselberger, Managing Director, SourceHOV Tax
What Happened to 15 Year Qualified Leasehold Improvement, Qualified Restaurant Property, Qualified Retail Improvement Property, Qualified Improvement Property, and Section 179? Additionally, when does Bonus Depreciation apply and what does Bonus Depreciation Apply to?

Course: 2035

Lunch Program

How to Talk About Philanthropy with Your Clients (1 CPE TAX)

Marie C. Smith, Director, Donor Relations & Communications; David Okorn, LI Community Found.
Financial advisers, attorneys, and accountants play a key role in philanthropy. The most effective way of doing this is by proactively talking about giving with their clients. The benefits of doing so are profound. Advisers can build trust and rapport with their clients, donors can become more effective in their philanthropy and support for charitable organizations will grow, ensuring safer, healthier and better communities. In this 50 minute session they will present various ways to help you identify and seize opportunities to save your clients money and plan their charitable legacy.

Course: 2036

Lunch Program

NYS Tax Collections and Enforcement Update (1 TAX CPE)

Argi O'Leary, Deputy Commissioner, Civil Enforcement

Division & Office of Professional Responsibility, NYS Department of Taxation and Finance

Learn about the new grounds for exemption from the NYS driver's license suspension program and how to help your clients who may be eligible for an exemption; updates and changes to the NYS offer-in-compromise program; and NY's efforts to regulate tax return preparers who violate NYS laws and standards of conduct.

Course: 2037

Just Lunch

Course: 2041

1040 Update Part 1 (TAX CPE) (CFP) (CLE) (2 IRS CE)
Neil D. Katz, J.D., LL.M., CPA

This presentation will focus on the changes that affect the preparation of the 2019 Form 1040, including a complete discussion of the aftermath of the Tax Cuts and Jobs Act and the recent guidance that has been issued to address these and other provisions. In addition, there will be a discussion of the latest case law, rulings and other current developments that affect the 2019 tax year.

This course continues at 2051 and is a Repeat of 1041

Course: 2042

Cryptocurrency, Cybercrimes, Ransomware & Data Breach; IRS Security Measure to the Protect Tax Professionals (TAX CPE) (2 IRS CE)

Senior Stakeholder Liaison Linda Henson, Communications & Liaison and Special Agent Christopher H. King, Criminal Investigations

IRS' Criminal Investigations & Stakeholder Liaison representatives will discuss Cryptocurrency, Cybercrimes, Ransomware & Data Breach from both, the criminal and civil perspective. Information will be provided on the various procedures that have been implemented for taxpayers and tax practitioners to minimize risks as well the necessary steps to take if you become prey to these devices.

Course: 2043

How to Plan for "The New Retirement" (TAX CPE) (CFP)

Mark Badami CFP®, CLTC and Larry Heller, CFP®, CPA
People are living longer. We will discuss how to best create a retirement plan in today's world. We will cover. How to put together an investment portfolio for retirement. How to determine best draw down strategy from investments. How to minimize income taxes How to coordinate pension, social security and investment withdrawals.

Course: 2044

NYC/NYS Update (TAX CPE) (CLE)

(NYS); Robert Smith, Outreach Services, NYS Department of Taxation and Finance (NYC); TBA – see website [litps.org](https://www.litps.org) for updates

NYS Tax Department Outreach Services - This session will cover the latest NYS legislative developments pertaining to taxation and return processing updates. Key messages for tax practitioners and Department initiatives will also be discussed.

Course: 2045

Beyond Estate Planning (TAX CPE) (CLE)

Stuart Schoenfeld, Esq.

Medicaid planning is just a start – Help your aging clients access available technology, quality care and community services to protect their lifestyle, live independently and manage their care needs. This will be an interactive panel.

Course: 2046

State Tax Audit Update (TAX CPE) (CLE)

Brian Gordon, CPA

An update on all of the key State Tax audit issues taxpayers are facing today. Primary focus will be on NYS Residency, Sales Tax and Nexus issues.

Course: 2051

1040 Update Part 2 (TAX CPE) (CFP) (CLE) (2 IRS CE)

Neil Katz, J.D., LL.M., CPA

This is a continuation of Course 2041 & a Repeat of 1051

Course: 2053

Tax Efficient Investing (TAX CPE) (CFP)

Joyce A. Streithorst, CFP®, MSFS, CIFA and Richard L. Bergen, CPA, CFP®, PFS

Most individuals and many accountants don't understand how coordinating tax efficient investing can increase overall performance. We will cover capital gains tax rate planning, mutual fund efficiencies, tax loss harvesting, the importance of asset location for both accumulators and distributors, Medicare premium implications and many other strategies.

Course: 2054

2019 Labor and Employment Law Update; If You Sneeze Wrong, Expect to Be Sued (CPE TAX) (CLE)

Glenn J. Franklin, Esq. and Danny Carrascal, Esq.

We will discuss updates and developments in labor and employment law, both NYS and federal. Specific topics will include: wage and hour information, sexual harassment prevention training requirements; independent contractor v. employees, the new standard for discrimination/harassment claims, workers' compensation, unemployment insurance, new local, city and state laws and requirements.

Course: 2055

Advising the College Bound Family (SK CPE)

Tony Esposito, Independent Educational Consultant and Jan Lerner Esposito, Certified Educational Planner

Much is changing in the world of financial aid, scholarships, college loans, and college admissions. Learn what you need to know about the new trends in college discounting and how to help your clients protect their assets. Included will be a brief overview of financial aid forms.

Course: 2056

Standardizing Your Tech Stack (SK CPE)

A David Bergstein CPA, CITP, CGMA

This session will introduce the importance of an efficiently designed, standardized stack of technology applications (tech stack) to implement in multi-service tax and accounting firms. This session will enable attendees to create a cloud-based tech stack to streamline firm services, processes and operations. This session will also enable attendees to create a cloud-based tech stack to deliver CAS (Client Accounting Services) and real time accounting. This session will introduce the anchor platforms for CAS, Tax and Practice Management and review how most transactional tasks can be automated. The course will also introduce additional integrated cloud applications that automate and streamline CAS tasks for the firm and the client. The course will provide attendees with a framework to customize technology stacks to automate and simplify workflows. Attendees will also receive resources to help transform traditional compliance oriented firms into proactive advisory oriented firms.

2019 Long Island Tax Professionals Symposium

DAY THREE | 11.22.19 SCHEDULE AT A GLANCE

7:00am-7:45am	Registration & Breakfast	9:45am - 11:05am	Keynote Speaker -	1:40pm-1:55pm	Afternoon Break
7:00am-3:50pm	Technology Fair Open	Attendance is Mandatory for FULL Day Credit		1:55pm-3:35pm	Concurrent Sessions
8:00am-4:00pm	Case Resolution Rooms	11:05am-11:20am	Morning Break	3:35pm-3:55pm	Afternoon Break
7:45am-9:25am	Concurrent Sessions	11:20am-12:40am	Concurrent Sessions		& Exhibitor Raffles
9:25am-9:45am	Morning Break	12:40pm-1:40pm	Lunch	3:55pm-5:35pm	Concurrent Sessions

Course: 3001

KEYNOTE SESSION Annual Survey of Income and Expense (ASIE) (1.5 TAX CPE)

Nassau County Executive, Laura Curran and County Assessor, David F. Moog, IAO
To value Tax Class 4 properties accurately the Department of Assessment utilizes an income approach for valuations. The (ASIE) provides the Assessor with the necessary background information of both income and expense to create more accurate values. Our goal is to educate the Tax Preparation specialist.

You must attend this session for a full day's credit



go through the appeals process from a BCMS hearing all the way to presenting oral arguments before the Tax Appeals Tribunal.

Course 3014

Accounting & Auditing Issues for 2019 (A & A CPE) Frank A. Gallo, CPA, Stephen Franciosa, CPA

This session will provide you with an overview of the recent changes to accounting and auditing standards. It will enable you to understand the requirements of the new standards and how they will affect your practice. We will also discuss common implementation issues found in accounting and auditing standards. We will also discuss what procedures your firm needs to put in place to implement these standards.

Course: 3015

Using Desktop Tax Software In Your Cloud Based Firm (MAP CPE)

Kevin Reinard, Senior Product Specialist

Implement a tax workflow in your office using both cloud-based products as well as desktop software. Using Lacerte® or Pro-series in a hosted environment allows you to streamline the tax prep process, save time and collaborate with staff.

Course: 3021

Aggregation for 199A (1 TAX CPE) (1 CLE) (1 CFP) Robert S. Barnett, CPA, JD, MS (Taxation)

The final 199A regulations changed the aggregation rules and made it a little easier for clients to maximize the 199A deduction. We will discuss the rules and how to make aggregation work for your clients. Aggregation for real estate entities will also be included.

Course: 3022

Captive Insurance: Helping Businesses Protect Their Assets (TAX CPE) (CFP)

Mark Badami CFP®, CLTC

Captives are an excellent vehicle for risk control, wealth accumulation, and improved cash flow, while minimizing insurance costs. For the last 60 years the U. S. Government has permitted companies to establish insurance companies in order to be prepared for multiple threats against their business while turning unrecoverable cost into solid profit!

During this session you will learn how this technical strategy can be utilized in a simplistic and helpful way with your clients to create large tax leveraged incentives.

Course: 3023

Now is the Time to Sell The Family Business – The State of the Market (1 SK CPE)

Anthony J. Citrolo, CPA/CMAA/CBI

Private Equity groups and Synergistic buyers are paying high values in this seller's market. We will discuss the state of the market for privately held business owners and why the timing is perfect to sell the family business.

Course: 3024

Kress v. United States: A Gamechanger for Business Valuations (1 TAX CPE) (1 CLE)

Anthony Basile PhD, CPA, CFE, CVA

In March 2019, the US District Court – Eastern District of Wisconsin, issued a decision that contradicts 20 plus years of decisions regarding valuations and is certainly a step in the right direction for the business valuation industry who have been advocating for the C to S method for almost 20 years. This presentation will discuss the implications the decision of Kress v. US has going forward.

Course: 3025

Wayfair – 1 Year Later: The Fall Out (1 TAX CPE) (1 CLE)

Mark L. Stone, CPA; Joseph Calamia II, CPA.; Bryan DeMarchis II, MBA

The US Supreme Court changed the world of sales tax when it ruled that economic nexus laws are constitutional. One year later, what are the effects? Are new laws a burden on small shops? How are companies responding? These questions will be answered.

Course: 3031

Lunch Program

The Good The Bad and The Ugly (1 MAP CPE)

Dan Fusco, IT Consultant, InnerPC Computer Solutions
Securing data for your client's information has never been more important. Everyday CPA firms are targets of cyber-crime because of the important data they contain for their clients.

In this Seminar you will learn the risks and benefits of cloud computing and its role in cyber-security. By the end of this session, you will leave with 7 steps to secure your company's data.

Course: 3032

Lunch Program

Divorce & Innocent Spouse (1 TAX CPE) (1 CLE) (1 CFP) (1 IRS CE)

Yvonne R Cort, Esq. and Sandra Radna, Esq.

What is involved in a successful NYS or IRS innocent spouse request? What tips can you give your divorcing client to protect their finances? This interactive presentation highlights important tax issues and strategies when divorce enters the relationship.

Course: 3033

Lunch Program

Coins, Currency, Gems and Jewels (1 TAX CPE) (1 CLE)

Robert Simon, President, Simon Rarities, Inc., Mark Schimmel, Coin Appraiser, Gregory Matalon, Esq.

They shine and glitter and line our safe deposit boxes; but don't forget, collectibles are often an important part of our estates. We will discuss important tax and administration issues unique to these assets.

Course: 3011

TCJA 2019 – Losses and Carryforwards (TAX CPE) (CLE) (CFP)

Robert S. Barnett, CPA, JD, MS (Taxation)

In 2018 we had our first experience with 199A – and what fun it was. 2019 is the first year when we have to include many of the calculations. We will review various different applications of the new law. Negative QBI will be compared to Excess Business losses and the required carryforwards. Net operating loss calculations will also be discussed.

Repeats at 3051

Course: 3012

IRA Distribution Rules and the Potential (or Actual) Impact of the SECURE Act (TAX CPE) (CFP) (CLE)

Neil Katz, J.D., LL.M., CPA

As savings in qualified plan accounts have become a more significant part of client's wealth and their estates, understanding the rules that apply to those accounts is often a paramount concern. With Congress working toward the passage of the SECURE Act, the landscape surrounding retirement account distribution planning is about to change, significantly. This session will focus on the rules that apply to the beneficiaries of IRAs after the death of the account owner and the options that are available. Included will be a discussion of the potential impact (or actual impact, if passed prior to the Symposium) of the SECURE Act on lifetime distributions and post-death distributions from IRAs and Roth IRAs.

Course: 3013

How to Fight Albany: Disputing a Sales Tax Assessment (TAX CPE) (CLE)

Mark L. Stone, CPA.; Jennifer Koo, Esq.; Jessica Cettina

This presentation will discuss what to do once a sales tax assessment has been issued. It will explain how to

2019 Long Island Tax Professionals Symposium

Course 3034

Lunch Program

The 4X Formula: How to Boost Growth and Profit in 2020 (1 MAP CPE)

Damien Greathead, VP, Business Development, Receipt Bank

Tax season doesn't have to be late nights, chasing clients and paperwork. With a few simple steps, you can streamline your tax preparation process saving you time and money. Your clients, your team, and your profit margins will love you for it. Recent research shows that digital firms grow four times faster than non-digital firms. With the year-end just around the corner, now is the perfect time to implement a new strategy to take advantage of AI and machine learning. In this session, we will discuss the value that technology implementation can bring to your firm. You'll discover how you can cut your tax prep and bookkeeping time in half, while providing a referral worthy service to your clients.

Learning Objectives: Understand new ways to collect the items you need from your clients without chasing; How to automate your internal processes; The trick to leveraging technology to widen your profiting margins, and delight your clients.

Course: 3035

Lunch Program

The Importance of Tax Research (1 SK CPE)

Jacob Meyer, Business Development, Tax Materials, Inc.

Do you prefer to research tax questions online, a book, or another means? We will discuss pros and cons of each option while applying them to real life situations. Learn how to save time researching tax questions and effectively explain tax concepts to your clients. A "how to" discussion on ways to utilize your complimentary *The TaxBook* will conclude the course.

Course: 3036

Lunch Program

Best Practices/Pitfalls in Transitioning to Cloud Accounting (1 MAP CPE)

Irene Wachsler, CPA

This seminar will discuss best practices and pitfalls to avoid when transitioning your client to Cloud / Online Accounting Programs. Focus on QuickBooks Online and Xero as well as other app integration / solutions for financial reporting, bill payment, invoicing, online payments.

Course: 3041

No Taxation without (Defense) Representation (TAX CPE) (CLE)

Joseph T. Conley III, Esq., Attorney-in-Charge, Suffolk County District Attorney's Office; James O. Druker, Esq.; Robert S. Barnett, Esq., CPA; Andrea Parness, CPA; Yvonne R. Cort, Esq.

A panel of attorneys and accountants representing the prosecution and defense will have a moderated discussion of criminal tax investigations in New York. The panel will provide insight for tax professionals by reviewing criminal tax laws and how cases are initiated, prosecuted, defended and resolved. Discussion will include the accountant's role and best practices.

Course: 3042

Business Valuation – The Insider's Scoop (TAX CPE) (CFP)

Nannette Watts, CPA/ABV/CFF

An appraisal expert's favorite answer is, "It depends." Touching on the science, with more focus on the art, this session will explore traditional business valuation topics from a practical approach with a focus on the relevance to smaller businesses to offer some insight about why it really does depend on the specific circumstances.

Course: 3043

Smarter Social Security (TAX CPE) (CFP)

Daniel G. Mazzola, CFA, CPA

An AARP survey determined that only half of its respondents who were either married or who had ever been married were aware that Social Security spousal benefits were available. This presentation will provide a broad overview of the Social Security program as it pertains to retirees and their beneficiaries while emphasizing spousal and survivor benefits. These auxiliary benefits will be examined and attendees will learn how to optimize payouts using a simple strategy.

Course: 3044

Medicaid Elder Law and the CPA: How to Identify Clients that Can Benefit from Medicaid Programs (TAX CPE) (CLE) (CFP)

Aaron E. Futterman, CPA, Esq.

We will educate CPA's about different Medicaid programs and benefits available and how to identify clients that would benefit from receiving Medicaid. We will discuss changes and updates in Medicaid laws over the last several years. Finally, we will discuss how the probate process and Medicaid intersect and affect each other.

Course: 3045

New York City Real Property Tax Appeals (TAX CPE) (CLE) (CFP)

Eric W. Olson, Partner, Akerman LLP

This program examines the New York City real property tax appeal process (aka "tax certiorari"), including review of the tax appeal calendar and procedure, Department of Finance notices, and Tax Commission forms. Applicable valuation methods and financial analysis techniques are discussed and presented, as well as special issues related to tax-exempt/abated and leased properties.

Course: 3046

Opportunity Zones, Delaware Statutory Trusts, and Other Alternatives to 1031 Exchanges Under the TCJA (TAX CPE)

*Mark E. Wilensky, Partner, Meltzer, Lippe, Goldstein & Breitstone, LLP; *Fortitude Investment Group - Roy V. Pfleger, Chief Operating Officer & Financial Consultant & Daniel P. Raupp, Co-Founder & Managing Partner*

A discussion on the intricacies of the DST (Delaware Statutory Trust) & QOF (Qualified Opportunity Funds) and how these programs should be considered as a potential solution for those considering a 1031 exchange or anticipating a transaction that results in a significant capital gain. *Fortitude Investment Group, LLC (FIG) offers securities through Concorde Investment Services, LLC (CIS), member FINRA/SIPC; advisory services offered through Concorde Asset Management, LLC (CAM), an SEC registered investment adviser; and insurance products offered through Concorde Insurance Agency, Inc. (CIA).

FIG is independent of CIS, CAM and CIA, all of whom are unaffiliated with aforementioned companies. This is for informational purposes only and not an offer to buy or sell any investments.

Course: 3051

TCJA 2019 – Losses and Carryforwards (TAX CPE) (CLE) (CFP)

Robert S. Barnett, CPA, JD, MS (Taxation)

This is a Repeat of Course 3011

Course: 3052

Mortgages Comings and Goings (SK CPE) (CFP)

Robert Tollin and John Iannuzzi

Two experienced mortgage banking veterans will bring us up to date on qualifications, underwriting and approvals for both traditional forward mortgages and reverse mortgages. Through the use of case studies and attendees' questions you will see a broad range of challenges and problems solved.

Course: 3053

Bitcoin, Blockchain & Cryptocurrencies: Understanding These Technologies and Their Impact on Financial Investigations and Forensic Accounting (TAX CPE) (CLE)

Nicholas G. Himonidis, J.D., CFE, CCFS

This program will provide a basic understanding of how cryptocurrencies and blockchains operate and discuss their impact on financial investigations and forensic accounting; including tips and techniques on identifying their potential use, tracing transactions, and strategies to tie crypto assets and transactions to specific individuals / entities.

Course: 3054

What's New in Lacerte (SK CPE)

David McMinn, CPA

Get ready for tax season with the best tips and tricks from Intuit Lacerte! See the new features and functionality that have been added for 2019, including both tax specific and program operational enhancements.

Course: 3055

The Future of Accounting Technology: Preparing for Artificial Intelligence (AI) and Machine Learning (SK CPE)

Kristoffer Røil, Co-Founder & COO, VIC.AI Inc.

Create an accounting firm that wins the best clients while retaining valued staff. Learn best practices for and advantages of integrating artificial intelligence (AI), and machine learning AI into your accounting firm.

Course: 3056

Estate Planning, Trusts, Asset Protection and Medicaid Myths (TAX CPE) (CLE) (CFP) (2 IRS CE)

Donna M. Stefans, Esq.; Marilyn Stefans, CFP, E.A., Henry Grabkowitz, E.A.

Discussion will explore various types of trusts, estate planning documents, Durable Power of Attorney and Medical Directives. It will include insights and practical information for taxation, gifting pitfall and Medicaid myths of asset protection.

Repeat of Course 1046

2019 Long Island Tax Professionals Symposium



REGISTRATION FORM

THREE EASY WAYS TO REGISTER (Questions? Please Call: 516-997-9500)

1) ONLINE: www.LITPS.org. **Online registration is CLOSED after 5pm, Friday, November 15.**

WE ENCOURAGE ONLINE REGISTRATION AS SESSIONS WILL FILL QUICKLY.

2) FAX* 516 997-5155

3) MAIL* Nassau/Suffolk Chapter, nccPAP

22 Jericho Turnpike, Suite 110, Mineola NY 11501

* Add \$45 Additional Registration Fee - (Except for online registration.)

Before registering, be sure to visit www.LITPS.org for program updates. Please be sure to include page 15 with your seminar selections.

REGISTRATION INFORMATION (One registration form per attendee, please duplicate this form as necessary)

Name _____ Phone _____ Fax _____

Company Name _____

Mailing Address _____

E-mail Address _____

Member ID # _____ State Lic. # _____

Member of (check all that apply) ☐ nccPAP ☐ FPA ☐ NATP ☐ NYSSEA ☐ NYSIA ☐ NYSSCPA ☐ IRS ☐ NAL ☐ ADFP

Annual dues must be current to receive member price.

By submitting this registration form, I agree to the terms and conditions set forth within the registration booklet.

CONFERENCE FEES (Includes: Continental Breakfast and Full Lunch)

BEFORE NOVEMBER 1, 2019

Member ☐ \$440 one day ☐ \$880 two days ☐ \$940 three days*

Non-Member ☐ \$490 one day ☐ \$980 two days ☐ \$1025 three days

AFTER NOVEMBER 1 2019

Member ☐ \$490 one day ☐ \$980 two days ☐ \$995 three days*

Non-Member ☐ \$565 one day ☐ \$1040 two days ☐ \$1165 three days

DAILY FEE AT THE DOOR

Members ☐ \$535 one day ☐ \$1015 two days ☐ \$1325 three days

Non-Members ☐ \$590 one day ☐ \$1165 two days ☐ \$1450 three days

* ☐ **SAVE \$100!** Registrants over two per same firm and members of a LITPS Sponsoring Organization may deduct \$100 from their three day registration fee. See page 3 for details.

☐ **REQUESTING APPOINTMENT WITH IRS REPRESENTATIVE**

☐ **REQUESTING APPOINTMENT WITH NYS TAX REPRESENTATIVE**

☐ **I am applying for CLE credit(s)**

Additional fee of **\$30 per credit** x No. of credits: _____ = Total \$ _____



PAYMENT INFORMATION

Check enclosed for \$ _____ payable to: Educational Foundation of Nassau/Suffolk Chapter of nccPAP

Please bill my credit card for \$ _____ ☐ MasterCard ☐ Visa ☐ Amex

Card No. _____ Exp. Date _____ CVC# _____

Name on Credit Card _____

Billing Address _____

State _____ ZIP _____

Signature _____ Date _____

SPECIAL DIETARY NEEDS _____

CANCELLATION POLICY

Full refunds for registration fees, less a \$100 processing fee, will be granted if a written request is received by NIS-nccpap office by November 2, 2019. We regret that refunds are not available after that date. However, registrants will receive access to all appropriate course materials.

2019 Long Island Tax Professionals Symposium

SCHEDULE AT A GLANCE

Check out your selections prior to registering on the website LITPS.org

Before registering, be sure to visit www.LITPS.org for any updates or modifications to the program.

Day 1	Session 1	Session 2	Session 3	Session 4	Session 5	Session 6
7:00am-7:40am Registration & Breakfast						
7:40am-10:10am	Attendance is Mandatory for FULL Day Credit	1101 Keynote Speakers: Commissioner Michael R. Schmidt, NYS Department of Taxation and Finance and Jennifer B. Winters, Executive Secretary, NYS Education Department				
10:30am-12:10pm	Course 1021 Developments in Prep./Compilations/Reviews	Course 1022 IRS Collections & Appeals & IRS/Small Bus.-Self-Empl. Goals for Compliance	Course 1023 NYS Sales Tax Audit & Tax Collection Issues	Course 1024 401(k) Plans: Fiduciary/Remitting Deferrals/Auto-Enrol Pros & Cons	Course 1025 199A Demystified	Course 1026 Real Estate Tax Deductions Missed
LUNCH 12:15pm-1:15pm	Course 1031 1041 & TCJA	Course 1032 Financial Literacy for the Next Generation	Course 1033 Alternative Investments	Course 1034 Are You a QBO Hero?	Course 1035 Estate & Elder Plans for 99 1/2 Percent	Course 1036 Just Lunch
1:50pm-3:30pm	Course 1041 1040 Update Part 1	Course 1042 Roadblocks in M&A and How to Avoid Them	Course 1043 Long Term Care Consequences Are Real	Course 1044 2019 State and Local Tax Update	Course 1045 Taxpayer First Act	Course 1046 Estate Planning, Trusts, Assets & Medicaid
3:50pm-5:30pm	Course 1051 1040 Update Part 2	Course 1052 NY's Response to TCJA and Other Hot Topics	Course 1053 Asset Protection for Accountants, Doctors, Lawyers & others	Course 1054 Inner Workings of the IRS & Use That Knowledge To Benefit Your Clients	Course 1055 Special Needs Throughout a Lifespan	Course 1056 Find a Successor Who Will Pay You for Your Accounting Practice
5:30pm-7:00pm Cocktail Party						
Day 2	Session 1	Session 2	Session 3	Session 4	Session 5	Session 6
7:00am-7:40am Registration & Breakfast						
7:45am-9:45pm	Course 2011 NY's Response to TCJA and Other Hot Topics Repeat of 1052	Course 2012 Accounting & Auditing Updates	Course 2013 Divorce - Litigation vs. Collaborative vs. Mediation	Course 2014 IRS Updates and Cybersecurity	Course 2015 Getting Uncle Sam of Your Retirement	Course 2016 Current Developments in CT/NJ Taxation
9:45am-10:45am	Attendance is Mandatory for FULL Day Credit	2001 Keynote Speaker: Commissioner Charles P. Rettig, IRS				
11:00am-12:30pm	Course 2021 IRS Audit & Tax Collection Issues	Course 2022 Can You Reduce My Taxes	Course 2023 What You Really Need to Know About IRAs	Course 2024 1031 Exchanges after TCJA	Course 2025 Mitigate Cyber Threats w/ Strong Data	Course 2026 Important Wage and Hour Law Changes & DOL Audits
LUNCH 12:40pm-1:40pm	Course 2031 Secure Act IRA Planning	Course 2032 Challenging Assessed Tax	Course 2033 The R&D Tax Credit & Business Incentives	Course 2034 15 Year Qualified Property, Bonus Depreciation, etc.	Course 2035 How to Talk Philanthropy with Your Clients	Course 2036 NYS Tax Collections & Enforcement Update
1:55pm-3:30pm	Course 2041 1040 Update Part 1 Repeat of 1041	Course 2042 Cryptocurrency, Cybercrimes, Ransomware & Data Breach	Course 2043 How to Plan for "The New Retirement"	Course 2044 NYC/NYS Update	Course 2045 Beyond Estate Planning	Course 2046 State Tax Audit Update
3:55pm-5:35pm	Course 2051 1040 Update Part 2 Repeat of 1051	Course 2052 See website for details	Course 2053 Tax Efficient Investing	Course 2054 2019 Labor & Employment Law Update	Course 2055 Advising the College Bound Family	Course 2056 Standardizing Your Tech Stack
Day 3	Session 1	Session 2	Session 3	Session 4	Session 5	Session 6
7:00am-7:40am Registration & Breakfast						
7:45am-9:45pm	Course 3011 TCJA 2019 - Losses and Carryforwards	Course 3012 IRA Distribution Rules & the Impact of the SECURE Act	Course 3013 Fight Albany: Disputing a Sales Tax Assessment	Course 3014 Accounting & Auditing Issues for 2019	Course 3015 Desktop Tax Software In Cloud Based Firm	
9:45am-10:45am	Attendance is Mandatory for FULL Day Credit	3001 Keynote Speakers: Nassau County Executive, Laura Curran and County Assessor, David F. Moog, IAO				
11:00am-12:30pm	Course 3021 Aggregation for 199A	Course 3022 Captive Insurance: Helping Businesses Protect Assets	Course 3023 Time to Sell The Family Business	Course 3024 Kress v. United States: A Gamechanger	Course 3025 Wayfair, 1 Year Later: The Fall Out	
LUNCH 12:40pm-1:40pm	Course 3031 Good, Bad & Ugly	Course 3032 Divorce & Innocent Spouse	Course 3033 Coins, Currency, Gems and Jewels	Course 3034 The 4X Formula: Boost Growth & Profit	Course 3035 Importance of Tax Research	Course 3036 Practices/Pitfalls Cloud Accounting
1:55pm-3:30pm	Course 3041 No Taxation without (Defense) Representation	Course 3042 Business Valuation - The Insider's Scoop	Course 3043 Smarter Social Security	Course 3044 Medicaid Elder Law & CPA	Course 3045 NYC Real Property Tax Appeals	Course 3046 Opportunity Zones, Delaware Trusts/ Alts to 1031 Exch.
3:55pm-5:35pm	Course 3051 TCJA 2019 - Losses and Carryforwards	Course 3052 Mortgages Comings and Goings	Course 3053 Bitcoin, Blockchain & Cryptocurrencies	Course 3054 What's New in Lacerte	Course 3055 The Future of Acct Technology: AI	Course 3056 Estate Planning, Trusts, Assets & Medicaid Repeat of 1046

2019 Long Island Tax Professionals Symposium



LONG ISLAND TAX PROFESSIONALS SYMPOSIUM

November 20, 21, 22, 2019

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Public Relations – IRS

Linda Henson - *Senior Stakeholder Liaison*

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Event Staff

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