54TH ANNUAL TAX INSTITUTE
Current Issues and Topics for Attorneys & CPAs

Friday, November 22, 2019
8 a.m. to 5 p.m. (breakfast/registration at 7:30 a.m.)
RIT Inn & Conference Center, 5257 W. Henrietta Road, Henrietta, NY

PROGRAM CHAIRS:
Anthony Sandonato, CPA/ABV, CVA, Esq.
Mengel Metzger Barr & Co. LLP
Chair - MCBA Tax Section

Michael Desmond, CPA
Heveron & Company CPAs
Chair – NYSSCPA Rochester Chapter Tax Committee

AGENDA & SPEAKERS

7:30 a.m. BREAKFAST & REGISTRATION
8 a.m. WELCOME
8:10-9:25 a.m. FEDERAL LEGISLATIVE AND CASE LAW UPDATE
Randall P. Andreozzi, Esq., Andreozzi Bluestein LLP
Christopher G. Gamble, CPA, CFP, RDG+Partners

9:30-10:20 a.m. PARTNERSHIP TAX UPDATES
Gerald F. Stack, Esq., Barclay Damon LLP

10:20 a.m. BREAK

10:30 a.m.-NOON NEW YORK STATE LEGISLATIVE AND CASE LAW UPDATE
Elizabeth Pascal, Esq., Hodgson Russ LLP

NOON-1:15 p.m. LUNCH – KEYNOTE SPEAKER: TAX IMPLICATIONS OF EVOLVING MARIJUANA LEGISLATION, JASON W. KLIMEK, ESQ., BOYLIN CODE LLP

1:15-2:05 p.m. IRC 199A – WHAT WE HAVE LEARNED AND PLANNING OPPORTUNITIES
Danielle B. Ridgely, Esq., Woods Oviatt Gilman LLP
David Veniskey, CPA, AEP, EFPR Group LLP

2:05 p.m. QUICK BREAK

2:10-3 p.m. BREAKOUT SESSION NO. 1 (SELECT ONE)

QUALIFIED OPPORTUNITY ZONES
Joshua E. Gewolb, Esq., Harter Secrest & Emery LLP
Don Warrant, CPA, Freed Maxick

ESTATE AND TRUST PLANNING AFTER THE TCJA
Timothy C. Muck Esq., Barclay Damon LLP
Jordan Tepfer, CPA, Mengel Metzger Barr & Co. LLP
3-3:15 p.m. **BREAK**
3:15-4:05 p.m. **BREAKOUT SESSION NO. 2 (SELECT ONE)**

**SALES TAX NEXUS UPDATES IN LIGHT OF WAYFAIR**
Amy L. Varel, Esq., McConville Considine Cooman & Morin, P.C.
Antoinette Spina, CPA, Bailey, Carr CPAs, P.C.

**CONCEPTS IN SYNDICATION OF TAX CREDITS**
Steven J. Weiss, Esq., Cannon Heyman & Weiss, LLP
Timothy Flaherty, Esq., CPA, Flaherty Salmin CPAs

4:10-5 p.m. **IRS AND NYS APPEALS AND COLLECTION: CURRENT ISSUES AND DEVELOPMENTS**
Sherry Kraus, Esq., Sherry S. Kraus, Esq.
Michael Tedesco, Esq., Andreozzi Bluestein LLP

*Special Thanks to Our Underwriters:

**MCLE:** 9.0 Professional Practice
**CPE (CPAs):** 9.0 Taxation
This live program is transitional and approved for all attorneys & CPAs.

**Registration – 54th Annual Tax Institute**

- Enclosed is $_____ for ____ reservation(s) for:
  - MCBA Tax Section Member: $300
  - NYSSCPA Member: $300
  - MCBA Members: $325
  - New Admittee (Attorney): $275
  - Non-Members: $445
  - Paralegal/CPA Staff: $230

Registrant: ____________________________________________ E-Mail: _______________________
Organization: __________________________________________
Address: _______________________________________________ Phone: _______________________

Please send check payable to MCB Center for Education to:
Registrar, One W. Main St., 10th Floor, Rochester, NY 14614

To charge this program, please complete and fax to the MCBCFE, 585-546-1807 or mail.
- Charge $_______ to my: O MasterCard O Visa O AmEx Expires: ___________
- Security Code ______ Account#: ___________________________________________
- Cardholder’s Signature: ______________________________________________________

**Refund Policy:** Your registration fee will be refunded minus a $30 administrative if you call to cancel by Nov 9.
**Financial Hardship Policy:** If you want to apply for our Hardship Tuition Assistance, please go to www.mcba.org and submit the application at least one week prior to the program date.

Register online www.mcba.org/calendar