

Monday,
July 31, 2023

**Registration &
Welcome Reception**
5:00-6:30pm



Tuesday,
August 1, 2023

■ **Breakfast**

7:30-8:30am

■ **Session 1**

8:30-8:40am | Amanda Garner
Welcome/Introductions

8:40-9:10am | Jeff Pawlow
Keynote Speaker - Empowering Firm Success

9:10-9:30am | Michael Wall + Murang Pak
Using Land Preservation as
a Tax Mitigation Strategy

9:30-9:50am | Warren Kirshenbaum +
Melina Ambrosino
Offsetting Taxes for Commercial
Real Estate Investors

■ **Break/Networking**

9:50-10:30am

■ **Session 2**

10:30-10:50am | Josh Cordle + David Ronen
Capitalizing on American Grown Solar Energy

10:50-11:10am | David Spray
Understanding IC-DISC,
the What, How and Who

11:10-11:30am | Jonathon Morrison
Setting Up the Optimized CLAT: The Holy
Grail of Income Tax Deduction Strategies

11:30-11:50am | Rob Foster
Creating Portfolio Value Through
Property Tax Management

■ **Luncheon & Exhibits**

11:50am-1:00pm

■ **Session 3**

1:00-1:20pm | Quinn Ricker + Bart Peters
Exploring the Tax and Lifestyle
Advantages of Charter Aviation

1:20-1:40pm | Angel Way
Onshoring with a Virtual Tax Office

1:40-2:00pm | Jamie Lujan + Joyce Salazar
Understanding the Power of Grant
Funding in a For-Profit Business

2:00-2:20pm | Matt Vaadi
Exploring the Future of Payroll and
How AI Changes the Landscape

■ **Break/Networking**

2:20-3:00pm

■ **Session 4**

3:00-3:20pm | Nick Burgess
Using Premium Financed Life
Insurance as an Estate Strategy

3:20-3:40pm | Nick Sinclair
Solving the Talent Crisis

3:40-4:00pm | Benny Wright
Protecting Wealth When Disaster Strikes

4:00-4:20pm | Jerry Vaughn
Helping Small Businesses Scale
with Credit and Financing

4:20-4:30pm

End of Day/Closing Statements

■ **Cocktail Reception**

4:30-6:00pm

■ **Strategic Partner Hosted Dinners**

6:00pm

**Wednesday,
August 2, 2023**

■ **Breakfast**
7:30-8:30am

■ **Session 1**

8:30-8:40am | Amanda Garner
Recap

8:40-9:00am | Vince Nelson
Reviewing Unique Tax Mitigating
Investment Strategies

9:00-9:20am | Mike D'Onofrio
Understanding New Cost Segregation
Strategies to Maximize Your Benefit

9:20-9:40am | Louie Rosalez
Looking at Volatility as a Catalyst
to Grow Your Business

■ **Break/Networking**
9:40-10:20am

■ **Session 2**

10:20-10:40am | Karl Francetic
Using Real Estate as a Tax-Advantaged
Alternative Investment Strategy

10:40-11:00am | Sara Huddleston
Leveraging Learning Opportunities
to Bolster Organizational Identity

11:00-11:20am | Kim Lochridge
Uncovering the Power of R&D and
Understanding Recent Updates

11:20-11:40am | Bethany Williams
Navigating the 1031 Exchange Life Cycle

■ **Luncheon & Exhibits**
11:40am-12:50pm

■ **Session 3**

12:50-1:10pm | Pat Morrell
Relieving the Management Pains Felt by
Today's CPA Firm Leaders

1:10-1:30pm | Shawn Long
Learning the Great Cybersecurity Acronym

1:30-1:50pm | Heidi Henderson
Exploring the Changes for 179D and 45L
Incentives Related to Energy Efficient Buildings

1:50-2:10pm | Pickens Calhoun
Defining Best Practices for WOTC Optimization

2:10-2:30pm | Brad Gornto
Compelling Tax Mitigation: Immediate Tax
Savings from Clients' Future Charitable Gifts

■ **Break/Networking**
2:30-3:00pm

■ **Session 4**

3:00-4:00pm | Jeff Pawlow
Advisory Accelerator Ecosystem Overview



[Click here to review full agenda as more topics and speakers are added.](#)

*Speakers, presentation and/or presentation times on this agenda are subject to change