

Monday, July 29, 2024

| | | | |
|------------------|------------------|------------------|---|
| | | 1:00 PM | Registration |
| Session 1 | | | Welcome A. Garner, The Growth Partnership |
| | 2:00-3:40 | | IMPROVING Agility: Reigniting Communication and Leadership for an Adaptive Firm J. Colby, Keynote Awakening Opportunities To Maximize Tax Credits W. Kirshenbaum, Cherrytree Group |
| | | 3:40-4:00 | Networking Break |
| Session 2 | | | Activating the 1031 Exchange to Mitigate Tax Liabilities V. Nelson & B. Williams, Arno Wealth |
| | 4:00-5:00 | | Using Real Estate as a Tax-Advantaged Alternative Investment Strategy K. Francetic, Realty Investor Capital Being the Hero: How CPAs Deliver Even More Value with RETCs E. Gordon, B-10 Energy |
| | | 5:00-6:30 | Cocktail Reception |

Tuesday, July 30, 2024

| | | | |
|------------------|--------------------|--------------------|---|
| | | 7:30-8:30am | Breakfast and Attendee Check-in |
| Session 3 | | | Uncovering the Power of Conservation Easements M. Pak & M. Wall, InVia Capital |
| | 8:30-10:00 | | Protecting Wealth When Disaster Strikes B. Wright, Victory Claims Consulting Reimagining the Tax Advantages of Patents A. Hein & N. Stabinsky, Patent Veritas, LLC Capitalizing on WOTC Options for Clients P. Calhoun, Rockerbox |
| | | | 10:00-10:40 |
| Session 4 | | | Leading Business Owners Through a Successful Business Exit D. Deru, Orkid |
| | 10:40-12:00 | | Unlocking Cash Flow Solutions: Building a Profitable and Secure Business Foundation J. Vaughn, Guardian Chamber Using the Optimized Gift Trust as a Solution for Pre-2026 Sunset Estate Tax Planning J. Morrison, Frazer Ryan Goldberg & Arnold Igniting Tax Savings Through Future Charitable Giving B. Gornto, iCLAT Solutions, LLC |

| | | | |
|------------------|------------------|-------------------|--|
| | | 12:00-1:10 | Luncheon & Exhibits |
| Session 5 | | | Understanding IC-DISC - the What, How and Who D. Spray, Export Advisors, Inc |
| | 1:10-2:30 | | Exploring Tax Updates: Cost Segregation, 179D, 45L, and R&D Tax Credits H. Henderson, Engineered Tax Services Navigating the Corporate Transparency Act: Compliance, Challenges, and Innovative Solutions M. Johnson, FinCEN Advisors |
| | | 2:30-3:10 | Networking Break |
| Session 6 | | | Reimagining Premium Financed Life Insurance as an Estate Strategy N. Burgess, The Burgess Group |
| | 3:10-4:35 | | Rethinking Cybersecurity in 2024 S. Long, viLogics Exploring the Tax and Lifestyle Advantages of Charter Aviation J. Shook & B. Peters, Jet Access Group Strategic Partner Hosted Dinners |

Wednesday, July 31, 2024

| | | | |
|------------------|--------------------|--------------------|---|
| | | 7:30-8:30am | Breakfast and Attendee Check-in |
| Session 7 | | | Reconceptualizing Talent Acquisition in the Accounting Profession Today G. Lee, TOA Global |
| | 8:30-9:40 | | Exploring Employee Stock Ownership Plans as an Alternative Legacy Vehicle S. Ferrara & A. Kim, Morgan Stanley |
| | | 9:40-9:50 | Networking Break |
| Session 8 | | | Breakout (Facilitated Roundtables) |
| | 9:50-11:10 | | |
| | | 11:10-11:20 | Networking Break |
| Session 9 | | | Breaking the Accountability Code to Maximize Results A. Garner, The Growth Partnership |
| | 11:20-12:15 | | Closing Thoughts |