






55TH ANNUAL MNCPA

TAX CONFERENCE

November 16-17, 2009 :: Minneapolis Convention Center

www.mncpa.org/taxconference

MONDAY, NOVEMBER 16				
7 – 8 a.m.	Check-In, Continental Breakfast, Exhibits Open			
8 – 8:50 a.m.	A1. When It Comes to Team Building, Leadership and Motivation...Do You Believe in Miracles? Ross Bernstein, author of regional sports bestsellers			
9 – 10:15 a.m.	B1. Federal Individual Tax Highlights Andrew Biebl	B2. Employee Benefits: Pending Changes and Narrowing Exclusions Mary "Handy" Hevener	B3. Tax Policy and Budget Update Gregory Jenner	B4. International Tax Traps and Opportunities Brian Schwam & David Slemmer
10:15 – 10:45 a.m.	Refreshment Break, Exhibits Open			
10:45 a.m. – 12 p.m.	C1. Fiduciary Investment Management: How to Avoid Investment Scams David Bromelkamp	C2. Federal Business Tax Highlights Andrew Biebl	C3. Bankruptcy: How to Help Your Insolvent Client E. Lynn Nichols	C4. Ethics: What's Your Code? Ross Bernstein 
12 – 1 p.m.	Lunch, Exhibits Open			
1 – 2:15 p.m.	D1. Minnesota Tax Update Jerome Geis	D2. Payroll Tax and Worker Classification Mary "Handy" Hevener	D3. Energy Tax Issues and Planning Gregory Jenner	D4. Successful Succession: The Management Challenge Jeffrey Pawlow
2:15 – 2:45 p.m.	Refreshment Break, Exhibits Open			
2:45 – 3:35 p.m.	E1. Minnesota Income Tax Residency: Basics, Developments and Perils Thomas Muck	E2. Sales and Use Tax Update Gregory Anderson	E3. C vs. S: Determining When C Corporation Is the Best Option E. Lynn Nichols	E4. Social Networking: What All the Buzz Is About Jason Swartz
3:45 – 5 p.m.	F1. Disability Planning: Medical Assistance and Veterans Programs Theresa Kowalski	F2. The Evolving R&E Tax Credit Randy Crabtree & Dawson Fercho	F3. Ethics: It's a New Era for Tax Preparers E. Lynn Nichols 	F4. Practice Development Plans That Work Jeffrey Pawlow
5 – 6:30 p.m.	"Meet the Speakers" Reception			

TUESDAY, NOVEMBER 17				
7 – 8 a.m.	Check-In, Continental Breakfast, Exhibits Open			
8 – 9:15 a.m.	G1. Federal Individual Tax Highlights (Repeat of B1) Andrew Biebl	G2. Tax and Business Benefits Using Multiple Business Entities John "Jack" Surgent	G3. Effectively Managing Across Multiple Generations Jeffrey Pawlow	G4. PDFs: What Accountants Need to Know Thomas "Tommy" Stephens
9:25 – 10:15 a.m.	H1. Partnership Tax in 2009: The Good, The Bad and The Ugly Richard Bartholomew	H2. State Taxation Concepts: Overview & Technical Updates Jodie Scott	H3. Create Value and Get Paid What You're Worth Jeffrey Pawlow	H4. Ethical Leadership: From Compliance To Greatness Charles Weinstein 
10:15 – 10:45 a.m.	Refreshment Break, Exhibits Open			
10:45 a.m. – 12 p.m.	I1. Individual and Estate Tax Planning in a Bad Economy John "Jack" Surgent	I2. Federal Business Tax Highlights (Repeat of C2) Andrew Biebl	I3. Income Taxation of Estates and Trusts Douglas Wagman	I4. Effective Virtual Office: Best Practices Thomas "Tommy" Stephens
12 – 1 p.m.	Lunch, Exhibits Open			
1 – 2:15 p.m.	J1. Partnership Capital Accounts Richard Bartholomew	J2. Form 990 Update Karen Gries	J3. Foreclosure Tax Consequences Sharon Kreider	J4. Excel: Best Unknown Features Thomas "Tommy" Stephens
2:15 – 2:45 p.m.	Refreshment Break, Exhibits Open			
2:45 – 4 p.m.	K1. Estate Tax Update Richard Bartholomew	K2. S Corporation Tax Law Update Sharon Kreider	K3. Minnesota Professional and Legislative Update Betsy Adrian & Geno Fragnito	K4. Gizmos & Gadgets: Great New Tools Thomas "Tommy" Stephens
4:10 – 5 p.m.	L1. Life Is Like the Weather Paul Douglas, meteorologist			
5 – 5:15 p.m.	Door Prize Drawings			