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TAX23

What's brewing?

MNCPA TAX CONFERENCE

Nov. 13-14 | Minneapolis Convention Center or livestream
Nov. 15 | Virtual only

When it comes to taxes, something new is always brewing. The blend changes with shifting client, legislative and economic variables. Luckily, you know how to filter the issues.

- **Choose how you attend** — hybrid (in-person Nov. 13-14 and virtually Nov. 15) or entirely virtual all three days.
- **Customize your learning** — choose from 48 sessions on the latest federal individual and business tax updates, Minnesota tax developments and much more.
- **Earn valuable continuing education credits** — up to 24 CPE and 4 ethics credits. Select sessions will also qualify for CFP®, CLE and IRS CE (credit applications pending). View the latest credit updates online.
- **Make important connections** — with fellow attendees, sponsors and your professional association.
- **Save on CPE** — members save the most ($150!) with the VIP members-only discount. Not a member? There are other ways to attend for less, including early bird savings and discounts for large groups. *Details on page 15.*

NEW! The MNCPA TAX23 Young Professionals Track
Young professionals attend in person to participate in hands-on, case-study-focused sessions curated for their experience level. Recommended for staff with 1-4 years of experience. *Details on page 13.*

Get ready for a *latte* tax topics at TAX23.

REGISTER TODAY
www.mncpa.org/TaxConference

DAY ONE | MON., NOV. 13

	REGULAR TRACK IN-PERSON OR LIVESTREAM			YP TRACK IN-PERSON ONLY
8-9 a.m.	**A1. Economic Update: Challenges and Resilience in the Minnesota Economy** *Ron Wirtz, Federal Reserve Bank of Minneapolis, Minneapolis, MN* FOS: Economics - Technical (1)			
9:20-10:35 a.m.	**B1. Federal Individual Tax Highlights** *Pat Garverick, CPA, MT, CFP®* Taxes - Technical (1.5)	**B2. Corporate Transparency Act: What CPAs and Our Clients Need to Know** *Ed Zollars, CPA* Taxes - Technical (1.5)	**B3. Transfer Pricing and Managing Global Intangibles** *Michael Bredahl, CPA (inactive), MBA* *Guy Sanschagrin, CPA/ABV, MBA* Taxes - Technical (1.5)	**B4. Accelerating Your Research Workflow for Young Professionals** *Tammy Nickels* Specialized Knowledge-Technical (1.5)
10:55 a.m.-12:10 p.m.	**C1. Top 10 Residency Myths and Frequently Asked Questions** *Masha Yevzelman, JD* Specialized Knowledge-Technical (1.5)	**C2. Partnership Hot Topics and Current Developments** *Adam Sweet, JD, LLM* Taxes - Technical (1.5)	**C3. Sec. 1031 Under the Final Regulations: Opportunities and Potholes** *Mike Smith, CPA, CFE, CIT* *Roger Upton, CPA* Taxes - Technical (1.5) *Sponsored by MS Consultants*	**C4. Young Professionals 1120S Case Study** *Pat Garverick, CPA, MT, CFP®* Taxes - Technical (1.5)
12:10-1 p.m.	LUNCH | EXHIBITS			SESSION BEGINS WITH LUNCH
1-1:50 p.m.	**D1. Minnesota Department of Revenue Update** *Paul Marquart* Taxes - Technical (1)	**D2. Employee Retention Credit: IRS Enforcement Activity, Potential Liabilities and Risks to CPAs** *Ed Zollars, CPA* Taxes - Technical (1)	**D3. Power BI in 10 Easy Steps** *Steve Yoss, Jr., CPA, MS* Computer Software & Applications - Non-Technical (1)	**D4. Business and Dining Etiquette: Professionalism in the Workplace** *Deena Steinhaus* Personal Development - Non-Technical (2)
2:10-3:25 p.m.	**E1. Being Ethical Is Harder Than You Think** *Bret Hood, MBA, CFE* Behavioral Ethics - Non-Technical (1.5) E	**E2. Calculating the Proper Outside Basis for S Corporation and Partnership Interest Owners** *Ed Zollars, CPA* Taxes - Technical (1.5)	**E3. Inflation Reduction Act: Transforming 179D and 45L** *Todd French* Taxes - Technical (1.5) *Sponsored by Capstan Tax Strategies*	**E4. Young Professionals 1065 Case Study** *Pat Garverick, CPA, MT, CFP®* Taxes - Technical (1.5)
3:45-5 p.m.	**F1. MN Legislative and Professional Update** *Geno Fragnito* *Linda Wedul, CAE* Business Management & Organization - Non-Technical (1.5)	**F2. Federal Business Tax Highlights** *Pat Garverick, CPA, MT, CFP®* Taxes - Technical (1.5)	**F3. The Anatomy of a Sales and Use Case: From Audit to Litigation** *Ben Wagner, JD* Taxes - Technical (1.5) *Sponsored by Wagner Tax Law, P.A.*	**F4. Excel Accelerator: Essential Skills for Young Professionals** *Steve Yoss, Jr., CPA, MS* Computer Software & Applications - Non-Technical (1.5)
5-6 p.m.	HAPPY HOUR (registration suggested)			

A fresh brew?

If federal or Minnesota legislation is passed before the conference, TAX23 speakers will update their content to reflect the important developments.

SCHEDULES

DAY TWO | TUE., NOV. 14

	REGULAR TRACK IN-PERSON OR LIVESTREAM			YP TRACK IN-PERSON ONLY
8-9:25 a.m.	**G1. Navigating the Secure Act 2.0** *Susan Smith, CPA* Taxes - Technical (1.5)	**G2. Choosing and Changing Business Entities** *Mark Sellner, CPA Retired, JD, LLM (taxation)* Taxes - Technical (1.5)	**G3. Is Outsourcing the Answer to Your High Turnover Challenges or Shortage of Resources?** *Yann Beaullan-Thong, MS* Personnel/Human Resources - Non-Technical (1.5) *Sponsored by Accsurant*	**G4. Young Professionals 1040 Case Study (Part 1)** *Pat Garverick, CPA, MT, CFP®* Taxes - Technical (1.5)
9:45-10:35 a.m.	**H1. Tax Traps for U.S. Persons With Foreign Financial Assets: FBAR and Form 8938 Reporting Requirements** *Kathy Emro, CPA, MBA* *Alina Hagness, MAcc, CPA* Taxes- Technical (1)	**H2. Cryptocurrency and NFTs: The New Frontier** *Susan Smith, CPA* Specialized Knowledge-Technical (1)	**H3. New AICPA Tax Ethics Rules** *Mark Sellner, CPA Retired, JD, LLM (taxation)* Regulatory Ethics - Technical (1) E	**H4. Young Professionals 1040 Case Study (Part 2)** *Pat Garverick, CPA, MT, CFP®* Taxes - Technical (1)
10:55 a.m.-12:10 p.m.	**I1. Federal Individual Tax Highlights (Repeat of B1)** *Pat Garverick, CPA, MT, CFP®* Taxes - Technical (1.5)	**I2. Mastering the Inflation Reduction Act** *Susan Smith, CPA* Taxes - Technical (1.5)	**I3. Cybersecurity and the FTC Safeguards Rule: What You Need to Know to Protect Your Firm** *Kevin Fuller, MBA* Information Technology - Technical (1.5) *Sponsored by VC3*	**I4. Minnesota Individual Income Tax: M1 and Other Schedules** *Keri Reiter, CPA* Taxes - Technical (1.5)
12:10-1 p.m.	LUNCH | GOVERNMENT RELATIONS LUNCH (registration required) | EXHIBITS			
1-1:50 p.m.	**J1. Disconnect to Connect: Creating an Engaged Firm Culture One Employee at a Time** *Amy Vetter, CPA, CITP, CGMA, MBA, CSP, The B3 Method Institute, Chester, OH* Personal Development - Non-Technical (1)			
2:10-3:25 p.m.	**K1. Skill Up on Your Social Security Knowledge** *Rhonda Whitenack* Specialized Knowledge - Technical (1.5)	**K2. Federal Business Tax Highlights (Repeat of F2)** *Pat Garverick, CPA, MT, CFP®* Taxes - Technical (1.5)	**K3. Your Greatest Leadership Challenge: A Look in the Mirror at Self-Leadership** *Jon Lokhorst, CSP, CPA, PCC* Personal Development - Non-Technical (1.5)	**K4. Mastering Intermediate Excel: Skills for Young Professionals** *Steve Yoss, Jr., CPA, MS* Computer Software & Applications - Non-Technical (1.5)
3:45-5 p.m.	**L1. Minnesota Income Tax Update** *Dan Kidney, CPA, JD* Taxes - Technical (1.5)	**L2. Selling a Business: A Practical Guide to CPAs as Advisers to Business Owners** *Dan Mulvaney, CPA (Inactive)* Specialized Knowledge - Technical (1.5)	**L3. Artificial Intelligence for Accounting and Financial Professionals** *Steve Yoss, Jr., CPA, MS* Specialized Knowledge - Technical (1.5)	**L4. Young Professionals Career Development: Be the CEO of Your Career** *Jon Lokhorst, CSP, CPA, PPC* *Linda Wedul, CAE* Personal Development - Non-Technical (1.5)

DAY THREE | WED., NOV. 15 (VIRTUAL)			
8-9:25 a.m.	**M1. Estate, Gift and Trust Planning in a High (Rising?) Interest Rate Environment** *Paul J. Dinzeo, CPA, MBT, JD, CFP®* Specialized Knowledge - Technical (1.5)	**M2. Cannabis 101 for CPAs: Tax and Accounting Issues You Need to Know** *Cory M. Parnell, CPA* *Calvin P. Shannon, CPA, CVA* Taxes - Technical (1.5) **YP friendly**	**M3. How to Increase an Accounting Firm's Capacity** *Bob Lewis* *Doug Lewis* Business Management & Organization - Non-Technical (1.5)
9:45-10:35 a.m.	**N1. What Do I Do With This 1099-K?** *Ann Etter, CPA, MBA, CFP®* Taxes- Technical (1) **YP friendly**	**N2. Unemployment Insurance Tax: How to Manage Your Cost** *Aaron Tell* Specialized Knowledge - Technical (1)	**N3. Examining the Schedule K-1** *Danielle Tewes, CPA* Taxes- Technical (1) **YP friendly**
10:55 a.m.-12:10 p.m.	**O1. HSA Planning: Maximizing Tax-Advantaged Savings for Clients' Health Care Expenses** *Ben Henry-Moreland, CFP®, EA* Specialized Knowledge - Technical (1.5)	**O2. SALT Upper Midwest Legislative and Administrative Updates** *Dennis Anding, CPA, CMI* *Sara Arvold, CPA* *Maggie Young, CPA* Taxes - Technical (1.5) **YP friendly**	**O3. Staffing Market Update and How to Navigate the Noise of Recruiting and Retaining Employees** *Paige Batcha, CPA, MBA* *Ann Boarman* Personnel/Human Resources - Non-Technical (1.5)
12:10-1 p.m.	LUNCH		
1-2:15 p.m.	**P1. IRAs: What You Need to Know About Contributions, Conversions and Distributions** *George Koutelieris, CPA, MS-Tax* *Greg White, CPA* Specialized Knowledge - Technical (1.5)	**P2. The Seven Deadly Ethical Sins of Organizations** *Amanda "Jo" Erven, CPA, CIA, CFE, CTQA* Behavioral Ethics - Non-Technical (1.5) **YP friendly** E	**P3. Safeguarding Taxpayer Data: A Guide for Your Required Security Plan** *Tommy Stephens, Jr., CPA.CITP, CGMA* Specialized Knowledge - Technical (1.5)
2:35-3:50 p.m.	**Q1. Minnesota Income Tax Update (Repeat of L1)** *Dan Kidney, CPA, JD* Taxes - Technical (1.5) **YP friendly**	**Q2. Remote Seller Sales Tax Update** *Mike Fleming, CMI* Taxes - Technical (1.5)	**Q3. Technology Update** *Tommy Stephens, Jr., CPA.CITP, CGMA* Specialized Knowledge - Technical (1.5)
4:10-5 p.m.	**R1. Top Gun Success: Fighter Pilot Precision for CPAs** *Ed Rush, Executive Speakers Bureau, Germantown, TN* Personnel/Human Resources - Non-Technical (1) **YP friendly**		

ATTENDANCE OPTIONS

Hybrid & Young Professionals Track:

- Nov. 13-14 — attend in-person at the Minneapolis Convention Center
- Nov. 15 — attend virtually (optional for YP track)

Virtual only:

- Nov. 13-14 — attend the livestream
- Nov. 15 — attend virtually

DAY 1 | MONDAY, NOV. 13

8-9 a.m. | Keynote Session A

A1. Economic Update: Challenges and Resilience in the Minnesota Economy

Ron Wirtz, Federal Reserve Bank of Minneapolis, Minneapolis, MN

Inflation and labor availability affect every business in today's economy. Get a well-rounded view of Minnesota's economy, including its strengths and challenges. Discuss the current state of the Minnesota economy, the challenges of the present environment and the special role of labor force in long-term economic growth. Using an interactive survey, gauge your fellow attendees' sentiment regarding recent business activity, hiring demand, labor availability, outlook and other issues.

FOS: Economics - Technical (1)

9-9:20 a.m. | Break and Exhibits

9:20-10:35 a.m. | Breakout Sessions B

B1. Federal Individual Tax Highlights

Patrick Garverick, CPA, MT, CFP, The Tax U, Goodyear, AZ

Review various federal income tax laws impacting individuals with an emphasis on newly enacted tax legislation, court cases and IRS guidance. Topics will be updated depending on the most recent developments.

FOS: Taxes - Technical (1.5)

B2. Corporate Transparency Act: What CPAs and Our Clients Need to Know

Ed Zollars, CPA, Kaplan Financial Education, La Crosse, WI

Starting in 2024, the Corporate Transparency Act (CTA) requires most corporations, LLCs and other entities to file beneficial ownership reports. Many clients are unaware of these new requirements, so you'll need to bring the matter to their attention in time for them to comply with the law. Get guidance on identifying the entities subject to this requirement, pinpointing beneficial owners and understanding the critical timelines for both initial and revised report submissions. Delve into the potential civil and criminal repercussions for noncompliance and clarify the evolving role of CPAs in this landscape, so you can effectively navigate and advise on this pivotal reporting obligation.

FOS: Taxes - Technical (1.5)

B3. Transfer Pricing and Managing Global Intangibles

Michael Bredahl, CPA (inactive), MBA, WTP Advisors, Minnetonka, MN
Guy Sanschagrin, CPA/ABV, MBA, WTP Advisors, Minnetonka, MN

Transfer pricing has long been acknowledged as the number one international tax issue multinationals face. Transfer pricing risks include double taxation and non-deductible penalties and interest. Refresh your knowledge of the transfer pricing debate. Understand the motivations for the behaviors of companies and tax authorities. Gain clarity on the issues associated with related party transactions involving goods, services, financing and especially intangible property. Become better informed so you can make more solid judgments about how to measure and understand transfer pricing risk and planning opportunities for your business or your clients' businesses.

FOS: Taxes - Technical (1.5)

B4. Accelerating Your Research Workflow for Young Professionals

Tammy Nickels, Wolters Kluwer, Riverwoods, IL

YP track Examine the importance of tax research and the different methods of finding the right answers. Review how tax research has evolved over time and how new solutions, including AI, are providing increased productivity to all levels of staff.

FOS: Specialized Knowledge- Technical (1.5)

10:35-10:55 a.m. | Break and Exhibits

10:55 a.m.-12:10 p.m. | Breakout Sessions C

C1. Top 10 Residency Myths and Frequently Asked Questions

Masha Yevzelman, JD, Fredrikson & Byron, P.A., Minneapolis, MN

Misconceptions about Minnesota's residency rules continue to circulate throughout snowbird communities, and residency audits continue to rise. Address the top 10 residency myths and answer frequently asked questions about how to change residency. Understand what it actually takes to change residency from Minnesota to another state. Come away with tips on how to approach residency change conversations, including when preparing returns for new nonresidents of Minnesota.

FOS: Specialized Knowledge - Technical (1.5)

C2. Partnership Hot Topics and Current Developments

Adam Sweet, JD, LLM, Eide Bailly LLP, Spokane, WA

Discuss pertinent topics affecting partnerships, including recent court cases, regulatory guidance and IRS activity focusing on partnerships. Review what you should know to prepare for the 2023 tax filing season, including new Form 1065 and Schedule K-1 reporting items.

FOS: Taxes - Technical (1.5)

C3. Sec. 1031 Under the Final Regulations: Opportunities and Potholes

Mike Smith, CPA, CFE, CIT, MS Consultants, LLC, Pittsford, NY
Roger Upton, CPA, MS Consultants, LLC, Pittsford, NY

Section 1031 exchanges have undergone major changes under the Tax Cuts and Jobs Act. Hear a big picture overview of Section 1031 considerations, with actual examples. Learn how to plan for potholes and take advantage of opportunities, including: real versus personal property, how Section 1245 recapture can affect a 1031 exchange, what parts of an exchange bonus depreciation applies to and how taxpayers depreciate the property they relinquished in their exchange. *Sponsored by MS Consultants*

FOS: Taxes - Technical (1.5)

C4. Young Professionals 1120S Case Study

Patrick Garverick, CPA, MT, CFP, The Tax U, Goodyear, AZ

YP track Discuss the basics of S Corporation taxation, including formation, distributions, shareholder requirements, fringe benefits and compensation. Examine a trial balance, including the income statement and balance sheet, while reviewing a completed Form 1120S and Schedule K-1.

FOS: Taxes - Technical (1.5)

12:10-1 p.m. | Lunch & Exhibits | YP Track Lunch

1-1:50 p.m. | Breakout Sessions D

D1. Minnesota Department of Revenue Update

Paul Marquart, Minnesota Department of Revenue, Saint Paul, MN

The Minnesota Department of Revenue (MN DOR) has had another busy year. Hear from Commissioner Paul Marquart on the latest happenings. Get an overview of recently passed law changes, review the implementation efforts, and get up to date on the department's work to prepare for the upcoming tax filing season.

FOS: Taxes - Technical (1)

D2. Employee Retention Credit: IRS Enforcement Activity, Potential Liabilities and Risks to CPAs

Ed Zollars, CPA, Kaplan Financial Education, La Crosse, WI

Even though 2020 and 2021 are in the rearview, the buzz around Employee Retention Credit (ERC) consultants has not waned. They continue to advocate for hefty refunds, often leading employers down a precarious path. Unfortunately, you are left grappling with the aftermath of these claims. Explore the latest IRS guidance, ongoing enforcement actions and the potential pitfalls taxpayers may encounter – which extend beyond mere repayments. Additionally, address the dilemmas you face when clients demand amendments to payroll or income tax returns based on questionable claims. The IRS is now devoting extra resources to expand payroll tax exams related to this credit, so you need to be ready to assist clients dealing with these issues.

FOS: Taxes - Technical (1)

D3. Power BI in 10 Easy Steps

Steve Yoss, Jr., CPA, MS, K2 Enterprises, Hammond, LA

If you're ready to get started with Power BI or refine your skills, plan to participate in this session. Learn how to query data into Power BI, create visualizations in your reports, convert those reports to dashboards, optimize for mobile viewing, secure your dashboards and share them with your team.

FOS: Computer Software & Applications - Non-Technical (1)

D4. Business and Dining Etiquette: Professionalism in the Workplace (session begins with lunch)

Deenna Steinhaus, Etiquette and More, Mankato, MN

YP track Good manners and professional behavior are important in all settings. During the pandemic, college students and those new to the workforce lost the opportunity to learn etiquette in a professional setting. Make up for lost time with this interactive lunch-and-learn session. Learn about appropriate behaviors that will give you confidence that you are perceived as professional by your managers, coworkers and clients. Practice basic dining etiquette for professional and formal settings and get tips for presenting yourself as a confident professional.

FOS: Personal Development - Non-Technical (2)

"Good mix of topics and relevant to the current environment."
- 2022 attendee

1:50-2:10 p.m. | Break & Exhibits

2:10-3:25 p.m. | Breakout Sessions E

E1. Being Ethical is Harder Than You Think

Bret Hood, MBA, CFE, 21st Century Learning and Consulting, Hillsborough, NC

E In this completely interactive exercise, learn how your mind will betray your ethical baselines to achieve personal desires over organizational goals. Understand how you can easily fall victim to the slippery slope of unethical behavior. Assess how perspective, life experiences and culture can change ethical perceptions. Examine the psychological need to look at our actions favorably. Learn how to avoid and mitigate these traps as well as how to spot them in other people. Create triggers that will help you stay true to your ethical beliefs and avoid those fatal decision-making errors.

FOS: Behavioral Ethics - Non-Technical (1.5)

E2. Calculating the Proper Outside Basis for S Corporation and Partnership Interest Owners

Ed Zollars, CPA, Kaplan Financial Education, La Crosse, WI

In recent years, there's been a shift in the IRS's approach toward gathering comprehensive basis information for partnerships and S Corporation shareholders. Demystify the intricacies of basis calculation and shed light on viable strategies if you inherit clients lacking a historical basis record. Get insights to manage and advise on these evolving compliance demands. Learn to properly calculate basis in a partnership interest for the partner, compute stock and debt basis for an S Corporation shareholder and prepare a reasonably defensive beginning basis for new clients that have not previously maintained proper basis calculations.

FOS: Taxes – Technical (1.5)

E3. Inflation Reduction Act: Transforming 179D and 45L

Todd French, Capstan Tax Strategies, Dresher, PA

The passage of the Inflation Reduction Act of 2022 (IRA) has altered and amplified energy-efficient tax incentives for commercial real estate, the 179D deduction and the Section 45L tax credit. Compare the current version of each incentive to the "IRA version" and address changes to reference standards, calculation of incentives, documentation procedures and more. IRA provisions are already in effect and have brought sweeping changes. Plus, the IRS continues to roll out clarifying guidance. Hear an up-to-date digest of what you must know about energy-efficient tax incentives. Review real-life case studies and receive a variety of reference tables. *Sponsored by Capstan Tax Strategies*

FOS: Taxes - Technical (1.5)

E4. Young Professionals 1065 Case Study

Patrick Garverick, CPA, MT, CFP, The Tax U, Goodyear, AZ

YP track Examine the basics of partnership/LLC taxation, including formation, distributions, fringe benefits and guaranteed payments. Look at a trial balance, including the income statement and balance sheet, while reviewing a completed Form 1065 and Schedule K-1.

FOS: Taxes - Technical (1.5)

3:25-3:45 p.m. | Break & Exhibits

3:45-5 p.m. | Breakout Sessions F

F1. MN Legislative and Professional Update

Geno Fragnito, Minnesota Society of CPAs, Bloomington, MN
Linda Wedul, CAE, Minnesota Society of CPAs, Bloomington, MN

Dive into the eventful year of 2023 at the Capitol and its impact on the profession. Explore the MNCPA's advocacy efforts, legislative issues affecting you and your clients, and rule changes at the Minnesota Board of Accountancy. Discover initiatives to expand the pathway to CPA licensure and foster future CPAs. Get ahead of the game by examining emerging trends in technology, services and skills within the profession to strategically prepare for upcoming opportunities.

FOS: Business Management & Organization - Non-Technical (1.5)

F2. Federal Business Tax Highlights

Patrick Garverick, CPA, MT, CFP, The Tax U, Goodyear, AZ

Review various federal income tax laws impacting businesses, with an emphasis on newly enacted tax legislation, court cases and IRS guidance. Topics will be up to date and timely depending on the most recent developments.

FOS: Taxes - Technical (1.5)

F3. The Anatomy of a Sales and Use Case: From Audit to Litigation

Ben Wagner, JD, Wagner Tax Law, Minneapolis, MN

The Minnesota Department of Revenue is expanding its reach regarding sales and use tax obligations. Knowing the process should make it easier for you to secure more favorable results. Gain an understanding of the ins and outs of a typical sales and use tax examination, including what to expect during the audit and tips and tricks for successfully resolving a case in the Minnesota Appeals and Legal Services Division. Get insights on the nuts and bolts of a sales and use tax case. Review creative ways to resolve a pending examination without having to proceed to appeals and sidestep pitfalls in your pending sales and use tax examinations. *Sponsored by Wagner Tax Law, P.A.*

FOS: Taxes - Technical (1.5)

F4. Excel Accelerator: Essential Skills for Young Professionals

Steve Yoss, Jr., CPA, MS, K2 Enterprises, Hammond, LA

YP track Excel is the default program for many tax professionals — and highly effective, if used correctly. Get the necessary tools to turn data into meaningful information and examine cutting-edge ways to store, retrieve, report and analyze data using Excel and plugins. Receive recommendations on how to more efficiently use Excel and potential traps to avoid. Bring your devices to follow along with the interactive discussions, technology demonstrations, sample spreadsheets and demo tools.

FOS: Computer Software & Applications - Non-Technical (1.5)

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CPAs rely on a variety of tools, products and services to connect with clients, work productively and securely, engage with staff and run a successful business. Think your company can help? Sign on as a TAX23 sponsor — it's not too late!

Contact Leslie Mueller at lmueller@mncpa.org for information about sponsoring TAX23 or visit **www.mncpa.org/exhibit**.

8-9:25 a.m. | Breakout Sessions G

G1. Navigating the Secure Act 2.0

Susan Smith, CPA, Surgent, Radnor, PA

Get a meaningful overview of the Secure Act 2.0, its implications and how to navigate the complexities of the updated legislation as it relates to IRAs, employer-sponsored retirement plans, new retirement savings options, compliance and reporting requirements, challenges and uncertainties.

FOS: Taxes - Technical (1.5)

G2. Choosing and Changing Business Entities

Mark Sellner, CPA Retired, JD, LLM (taxation), Sellner Tax Consulting, LLC, Sarasota, FL

Refresh your awareness of planning opportunities and pitfalls for clients who are starting a new business or restructuring an existing business. Identify tax issues and opportunities for sole proprietorships, single member LLCs, partnerships, multi-member LLCs, S Corporations and C Corporations.

FOS: Taxes - Technical (1.5)

G3. Is Outsourcing the Answer to Your High Turnover Challenges or Shortage of Resources?

Yann Beaullan-Thong, MS, Accsurant, Mystic, CT

The Big Four have been using outsourcing for 20 years; without this strategy, you risk losing up to 30% of your business in the coming years. Examine the benefits and risks associated with outsourcing and explore different models of outsourcing that can help you solve your challenges with turnover and staff resources. *Sponsored by Accsurant*

FOS: Personnel/Human Resources - Non-Technical (1.5)

G4. Young Professionals 1040 Case Study (Part 1)

Patrick Garverick, CPA, MT, CFP, The Tax U, Goodyear, AZ

YP track Dig into the basics of individual taxation, including ordinary versus long-term capital gain tax rates, loss limitations, passive activities and the QBI deduction while reviewing and discussing a completed Form 1040. Also, work through how the Form 1120S Schedule K-1 and Form 1065 Schedule K-1 amounts are reported on the Form 1040 related schedules.

FOS: Taxes - Technical (1.5)

9:25-9:45 a.m. | Break and Exhibits

9:45-10:35 a.m. | Breakout Sessions H

H1. Tax Traps for U.S. Persons With Foreign Financial Assets: FBAR and Form 8938 Reporting Requirements

Kathy Emro, CPA, MBA, Global Tax Network, Maple Grove, MN
Alina Hagness, MAcc, CPA, Global Tax Network, Maple Grove, MN

For U.S. persons (citizens, green card holders and U.S. tax residents) there is more to worry about than simply filing your tax return – especially since it is not uncommon for taxpayers to have financial accounts outside of their home country. Define the Foreign Bank Account Reporting (FBAR) and Form 8938 requirements. Explore the proper reporting of FBARs and Form 8938, and other issues for tax filers with international investments. Review penalties for noncompliance and options if you need to correct previous compliance issues.

FOS: Taxes - Technical (1)

H2. Cryptocurrency and NFTs: The New Frontier

Susan Smith, CPA, Surgent, Radnor, PA

The growing popularity of cryptocurrencies and non-fungible tokens (NFTs) have revolutionized the financial landscape. Grow your knowledge and skills needed to understand the fundamentals of NFTs and cryptocurrencies. Examine the evolving cryptocurrency landscape, assess the tax implications of crypto/NFT-related transactions and understand the reporting and compliance implications.

FOS: Specialized Knowledge - Technical (1)

H3. New AICPA Tax Ethics Rules

Mark Sellner, CPA Retired, JD, LLM (taxation), Sellner Tax Consulting, LLC, Sarasota, FL

E Review the AICPA update to the Statements on Standards for Tax Services (SSTS) going into effect on Jan. 1, 2024. Discuss how to manage your tax function, apply IRS Treasury Circular 230 rules and apply the SSTS. Learn how to implement data protection, client representation guidelines and a tax quality control system.

FOS: Regulatory Ethics - Technical (1)

H4. Young Professionals 1040 Case Study (Part 2)

Patrick Garverick, CPA, MT, CFP, The Tax U, Goodyear, AZ

YP track Continue reviewing the basics of individual taxation, including Form 1040 and how the Form 1120S Schedule K-1 and Form 1065 Schedule K-1 amounts are reported on the Form 1040 related schedules.

FOS: Taxes - Technical (1)

10:35-10:55 a.m. | Break and Exhibits

10:55 a.m.-12:10 p.m. | Breakout Sessions I

I1. Federal Individual Tax Highlights (Repeat of B1)

Patrick Garverick, CPA, MT, CFP, The Tax U, Goodyear, AZ

Review various federal income tax laws impacting individuals with an emphasis on newly enacted tax legislation, court cases and IRS guidance. Topics will be updated depending on the most recent developments.

FOS: Taxes - Technical (1.5)

I2. Mastering the Inflation Reduction Act

Susan Smith, CPA, Surgent, Radnor, PA

The Inflation Reduction Act (IRA) has brought about significant changes to the economic and financial landscape, impacting businesses and individual taxpayers alike. Gain a comprehensive understanding of the IRA, its implications and how it relates to various topics, including corporate alternative minimum taxes, corporate stock repurchases and new and enhanced energy tax credits.

FOS: Taxes - Technical (1.5)

I3. Cybersecurity and the FTC Safeguards Rule: What You Need to Know to Protect Your Firm

Kevin Fuller, MBA, ThinkGard, Birmingham, AL

With the new FTC safeguard rules, protecting client data takes center stage. Examine how new FTC rules affect businesses. Examine how these rules relate to cybersecurity and the best ways to protect yourself and clients. *Sponsored by VC3.*

FOS: Information Technology - Technical (1.5)

I4. Minnesota Individual Income Tax: M1 and Other Schedules

Keri Reiter, CPA, Deloitte Tax LLP, Minneapolis, MN

YP track Gain an understanding of Minnesota individual income tax forms through interactive discussion of the ins and outs of Schedule M1SA (Minnesota Itemized Deductions), as well as adjustments from federal taxable income to Minnesota taxable income using Schedules M1M, M1MB and M1NC. Also, learn about common credits available on Schedules M1NC and M1REF.

FOS: Taxes - Technical (1.5)

12:10-1 p.m. | Lunch & Exhibits | GR Lunch (registration is required)

1-1:50 p.m. | Keynote Session J1

J1. Disconnect to Connect: Creating an Engaged Firm Culture One Employee at a Time

Amy Vetter, CPA, CITP, CGMA, MBA, CSP, The B3 Method Institute, Chester, OH

Learn to become a connected leader who contributes to cultivating an engaging and fulfilling work-life culture for yourself, your team and colleagues. Grow more mindful as a leader and improve how you communicate to achieve desired outcomes together as a team.

FOS: Personal Development - Non-Technical (1)

1:50-2:10 p.m. | Break & Exhibits

2:10-3:25 p.m. | Breakout Sessions K

K1. Skill Up on Your Social Security Knowledge

Rhonda Whitenack, Social Security Administration Office of Public Affairs, Bloomington, MN

Advise clients on the full range of Social Security benefits available to them and their family members, including Medicare enrollment. Know how to enact various strategies at different retirement ages and gain an understanding of how family members such as spouse, divorced spouse, widow or children can receive a benefit. Learn how to use online Social Security tools and check beneficiary benefit calculations, including Part B premium costs for higher income individuals.

FOS: Specialized Knowledge - Technical (1.5)

K2. Federal Business Tax Highlights (Repeat of F2)

Patrick Garverick, CPA, MT, CFP, The Tax U, Goodyear, AZ

Review various federal income tax laws impacting businesses, with an emphasis on newly enacted tax legislation, court cases and IRS guidance. Topics will be up to date and timely depending on the most recent developments.

FOS: Taxes - Technical (1.5)

K3. Your Greatest Leadership Challenge: A Look in the Mirror at Self-Leadership

Jon Lokhorst, CSP, CPA, PCC, Lokhorst Consulting LLC, Andover, MN

To lead others well, you must first lead yourself well. Take an inside-out approach to building the leadership capacity needed to lead your team or firm in today's rapidly changing marketplace. Learn how to show up as your best self and recognize potential leadership derailers. Discover strategies for self-leadership so you can deliver your best value as a leader.

FOS: Personal Development - Non-Technical (1.5)

K4. Mastering Intermediate Excel: Skills for Young Professionals

Steve Yoss, Jr., CPA, MS, K2 Enterprises, Hammond, LA

YP track Take your Excel knowledge to the next level for more effective and accurate data analysis. Get tips on valuable tools and insights to understand, manage and use data in an organized and meaningful manner. See examples of features such as tables, data modeling, Power Query, PivotTables and Power BI.

FOS: Computer Software & Applications - Non-Technical (1.5)

3:25-3:45 p.m. | Break & Exhibits

3:45-5 p.m. | Breakout Sessions L

L1. Minnesota Income Tax Update

Dan Kidney, CPA, JD, Wipfli LLP, Minneapolis, MN

Not only did the state enact major legislation in May — addressing corporate, personal and pass-through income taxes; adopting a retail delivery fee; and imposing a new payroll tax supporting a paid family and medical leave program — but taxpayers are still dealing with the retroactive federal tax conformity bill enacted in January. Minnesota tax law has evolved significantly throughout 2023. Look at important Minnesota tax developments, court decisions and tax planning considerations, as well as highlights from the near-final 2023 Minnesota tax forms and instructions.

FOS: Taxes - Technical (1.5)

L2. Selling a Business: A Practical Guide to CPAs as Advisers to Business Owners

Dan Mulvaney, CPA (Inactive), True North Mergers & Acquisitions, Minneapolis, MN

Every business owner eventually transitions out of their business; help your clients navigate this challenging, yet highly important, transaction and life event. From a sell-side perspective, examine topics to consider as you advise your clients' sale processes. Review the sale transaction process, from establishing a sale price to marketing the business, receiving offers and buyer's due diligence.

FOS: Specialized Knowledge - Technical (1.5)

L3. Artificial Intelligence for Accounting and Financial Professionals

Steve Yoss, Jr., CPA, MS, K2 Enterprises, Hammond, LA

Review new AI-driven tools for bookkeeping, accounts payable, reconciliation, expense reporting, scheduling, business processes and more. Identify the areas that you can use AI to save time and increase your efficiency.

FOS: Specialized Knowledge - Technical (1.5)

L4. Young Professionals Career Development: Be the CEO of Your Career

Jon Lokhorst, CSP, CPA, PCC, Lokhorst Consulting LLC, Andover, MN
Linda Wedul, CAE, Minnesota Society of CPAs, Bloomington, MN

YP track Examine how serving as the CEO of your career will equip you to create a professional vision that leads to unmatched success and fulfillment as a CPA. Expand your understanding of the value of the CPA designation and new developments in the CPA exam.

FOS: Personal Development - Non-Technical (1.5)

8-9:25 a.m. | Breakout Sessions M

M1. Estate, Gift and Trust Planning in a High (Rising?) Interest Rate Environment

Paul J. Dinzeo, CPA, MBT, JD, CFP®, Dougherty Trust Company, Sioux Falls, SD

The economy has transitioned from a 15-year low interest rate cycle to a significantly higher interest rate environment. The gift and estate tax planning techniques that were incredibly powerful for your clients may no longer be optimal. Learn relevant planning techniques for a high/rising interest rate environment. Understand how higher interest rates may impact prior planning and how to offer solutions to address those problems.

FOS: Specialized Knowledge - Technical (1.5)

M2. Cannabis 101 for CPAs: Tax and Accounting Issues You Need to Know

Cory M. Parnell, CPA, BGM, Bloomington, MN
Calvin P. Shannon, CPA, CVA, BGM, Bloomington, MN

Cannabis is a new, complex and growing industry. Learn about the nuanced issues cannabis operators face and how you can help clients who work in, or are looking to enter, this industry. Gain an understanding of the opportunities and the unique tax and accounting challenges presented by the cannabis industry.

Presented in partnership with BGM Boeckermann Grafstrom Mayer

FOS: Taxes - Technical (1.5) | **YP friendly session**

M3. How to Increase an Accounting Firm's Capacity

Bob Lewis, The Visionary Group, Palatine, IL
Doug Lewis, The Visionary Group, Palatine, IL

Outsourcing or offshoring is the most well-known solution to capacity issues, but what else can your firm do? Dive into what has created this capacity problem and how you can maintain and increase profitability by breaking down existing capacity barriers. Discuss options for firms of any size, including the impact of compression, value pricing, client analysis and adding advisory services. See how you can still take on new clients when capacity is already stretched. Review the use of partnering to add client value while increasing profits and learn how to create a capacity expansion plan that is unique to your firm's needs.

FOS: Business Management & Organization - Non-Technical (1.5)

9:25-9:45 a.m. | Break

9:45-10:35 a.m. | Breakout Sessions N

N1. What Do I Do With This 1099-K?

Ann Etter, CPA, MBA, CFP, Goodney & Associates, PA, Northfield, MN

Many individuals and businesses transact via PayPal, Square, Venmo and other third-party payment apps, which may trigger the issuance of a 1099-K. Get answers to common questions, including what to do about personal transactions reported on a 1099-K, 1099-K errors, how to report business transactions reported on a 1099-K, when a client should have received a 1099 but didn't, and how a business should record and report the fees charged by these companies. Bring your questions and discuss the best ways to help clients navigate the new world of third-party payment reporting.

FOS: Taxes - Technical (1) | **YP friendly session**

N2. Unemployment Insurance Tax: How to Manage Your Cost

Aaron Tell, Minnesota Department of Employment & Economic Development, Saint Paul, MN

Employers are statutorily obligated to comply with Minnesota Unemployment Insurance (UI) tax. When you understand how the program works, you can avoid unnecessary work and cost, including the amount of unemployment tax paid or reimbursed. Review what you need to know to manage your UI costs and avoid expensive mistakes.

FOS: Specialized Knowledge - Technical (1)

N3. Examining the Schedule K-1

Danielle Tewes, CPA, K1x, Inc., Spirit Lake, IA

Tax professionals are at a breaking point – increased disclosures, footnotes, labor challenges, increasing volume of K-1s, unstructured or standardized data. It's time to find efficient ways to do this work faster. Learn best practices on how to break down the modern-day Schedule K-1 analysis into manageable chunks. Expand your awareness of common footnotes and issues. Look at a technology solution that can organize the unstructured data and let your talent elevate their roles to analysis and review.

FOS: Taxes - Technical (1) | **YP friendly session**

10:35-10:55 a.m. | Break

10:55 a.m.-12:10 p.m. | Breakout Sessions O

O1. HSA Planning: Maximizing Tax-Advantaged Savings for Clients' Health Care Expenses

Ben Henry-Moreland, CFP®, EA, Kitces.com, Reston, VA

Health savings accounts (HSAs) can be a powerful tool for middle-income savers. Gain an understanding around HSA rules, including when individuals and families are eligible to contribute, which expenses are eligible, IRS recordkeeping requirements and what happens to an HSA if the account owner dies. Help your clients navigate HSA planning and get the most out of their tax-advantaged health savings.

FOS: Specialized Knowledge - Technical (1.5)

O2. SALT Upper Midwest Legislative and Administrative Updates

Dennis Anding, CPA, CMI, Crowe LLP, Oak Brook, IL
Sara Arvold, CPA, Crowe LLP, Oak Brook, IL
Maggie Young, CPA, Crowe LLP, Oak Brook, IL

Review timely updates from the most recent legislative sessions as well as administrative updates in the upper Midwest as it pertains to sales and use tax, income franchise tax and unclaimed property. Whether your business or clients are in a single state or multiple states, these updates will be helpful!

FOS: Taxes - Technical (1.5) | **YP friendly session**

"The cost was well worth the time spent and the knowledge/credits received."
– 2022 attendee

O3. Staffing Market Update and How to Navigate the Noise of Recruiting and Retaining Employees

Paige Batcha, CPA, MBA, Versique Search & Consulting, Minneapolis, MN
Ann Boarman, Versique Search & Consulting, Minneapolis, MN

Recruitment and retention are top of mind for most firms today, and there are a lot of ideas and opinions floating around the internet. Quiet the noise by building a solid understanding of current market trends in staffing. Gain a fundamental knowledge of recruiting and retention tactics and get answers to your staffing questions.

FOS: Personnel/Human Resources - Non-Technical (1.5)

12:10-1 p.m. | Lunch

1-2:15 p.m. | Breakout Sessions P

P1. IRAs: What You Need to Know about Contributions, Conversions and Distributions

George Koutelieris, CPA, MS-Tax, Johnson & Shute, P.S., Bellevue, WA
Greg White, CPA, WGN, PS, Seattle, WA

Help your clients increase tax savings with IRAs. Get practical guidance on converting traditional IRAs to Roths, including when and how. Gain perspective on identifying clients who should convert IRAs, who should recharacterize IRA contributions and how to recharacterize them. Also, identify pitfalls in the IRA area and get tips on preparing waiver statements for clients who fail to take the required minimum distribution.

FOS: Specialized Knowledge - Technical (1.5)

P2. The Seven Deadly Ethical Sins of Organizations

Amanda "Jo" Erven, CPA, CIA, CFE, CTQA
Audit. Consulting. Education. LLC, Brighton, CO

E Pride. Greed. Lust. Envy. Gluttony. Wrath. Sloth. Have you ever thought of these "seven deadly sins" in terms of ethics at your firm? Explore seven potential ethical sins in organizations today, from the wrath of disingenuous leaders to the lust of those with the "move fast and break things" mentality. The question is, which of the sins will your firm fall prey to? And how can you prevent it? Unethical behavior is all around us. Analyze real-life ethics and fraud cases, dissect the "why" behind each case and distinguish ways you can detect and prevent unethical behavior at your organization.

FOS: Behavioral Ethics - Non-Technical (1.5) | **YP friendly session**

P3. Safeguarding Taxpayer Data: A Guide for Your Required Security Plan

Tommy Stephens, Jr., CPA.CITP, CGMA, K2 Enterprises, Hammond, LA

Combatting today's cybercriminals takes all of us working together. The IRS works with state tax agencies and the tax industry to fight these 21st-century identity thieves. Learn how to fulfill your obligations under Publication 1345, Handbook for Authorized IRS e-file Providers of Individual Income Tax Returns, as well as PTIN and 4557 considerations. Review examples of basic security steps and how to take them. Identify the signs of data theft and how to report it. Delve into examples of how to respond and recover from a data loss and examine examples of specific compliance issues found in the FTC Safeguards Rule.

FOS: Specialized Knowledge - Technical (1.5)

2:15-2:35 p.m. | Break

2:35-3:50 p.m. | Breakout Sessions Q

Q1. Minnesota Income Tax Update (Repeat of L1)

Dan Kidney, CPA, JD, Wipfli LLP, Minneapolis, MN

Not only did the state enact major legislation in May — addressing corporate, personal and pass-through income taxes; adopting a retail delivery fee; and imposing a new payroll tax supporting a paid family and medical leave program — but taxpayers are still dealing with the retroactive federal tax conformity bill enacted in January. Minnesota tax law has evolved significantly throughout 2023. Look at important Minnesota tax developments, court decisions and tax planning considerations, as well as highlights from the near-final 2023 Minnesota tax forms and instructions.

FOS: Taxes - Technical (1.5) | **YP friendly session**

Q2. Remote Seller Sales Tax Update

Mike Fleming, CMI, Sales Tax and More, Rockwall, TX

Sales tax is constantly evolving, and a basic understanding of sales tax strategy is more important than ever. Look at the major changes in the sales tax world for remote sellers since Wayfair in 2018. Review the definitions of nexus, economic nexus and physical nexus. Examine trends such as changing thresholds, states aggressively auditing thresholds, increasingly common sales tax audits and more. Explore ways to be proactive vs. reactive and gain perspective on what could be coming in the future.

FOS: Taxes - Technical (1.5)

Q3. Technology Update

Tommy Stephens, Jr., CPA.CITP, CGMA, K2 Enterprises, Hammond, LA

Get insights, options and recommendations to help you decide which technologies will affect your business and which will give you a competitive edge. Review emerging and evolving tech options and the benefits and risks of adopting recent technologies. Evaluate current communications choices to improve your efficiency and identify key technologies to implement in your business and personal life. Learn how to develop a balanced tech strategy that includes current, emerging and future choices for your firm or business.

FOS: Specialized Knowledge - Technical (1.5)

3:50-4:10 p.m. | Break

4:10-5 p.m. | Keynote Session R

R1. Top Gun Success: Fighter Pilot Precision for CPAs

Ed Rush, Executive Speakers Bureau, Germantown, TN

Learn three keys to speed and success as a leader, garnered from a fighter pilot with a 13-year Marine Corps career. Dig into principles for getting more done in less time with less waste, thereby increasing productivity and decreasing error. Look at secrets to seamless, effective communication drawn from Ed's fighter pilot career and extensive business experience.

FOS: Personnel/Human Resources - Non-Technical (1) | **YP friendly session**

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NEW!

The MNCPA Tax Conference Young Professionals Track

- Two in-person days of hands-on learning.
- Real-life examples and case studies of common forms and schedules, including 1120S, 1065, 1040 and more.
- Hands-on practice with Excel.
- Tax research, career development and a business etiquette lunch.
- Check out agenda pages 3-4 for YP Track sessions on days one and two, and page 5 for optional YP friendly sessions on day three.

Designed for tax staff, associates and new seniors with 1-4 years of experience.

Space is limited to 50 attendees for the YP track! Register by Oct. 20!
952-831-2707 | www.mncpa.org/TaxConference/YP

FEATURED SPEAKERS

Pat Garverick
CPA, MT, CFP®, The Tax U
Tax expert and award-winning discussion leader

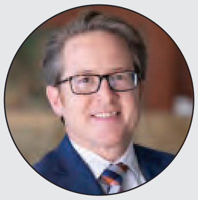
Dan Kidney
CPA, JD, Wipfli LLP
SALT and Minnesota tax specialist

Keynote — Ed Rush
Executive Speakers Bureau
Decorated F-18 pilot, author and speaker

Susan Smith
CPA, Surgent
Tax expert and award-winning discussion leader

Tommy Stephens, CPA.CITP, CGMA, K2 Enterprises
Firm founder and technology expert

Keynote — Amy Vetter, CPA, CITP, CGMA, MBA, CSP
The B3 Method Institute
Speaker, consultant, author and podcast host



Keynote — Ron Wirtz, Federal Reserve Bank of Minneapolis
Economic expert

Edward K. Zollars, CPA, Kaplan Financial Education
Tax expert, author and podcast host

GENERAL INFORMATION

IN-PERSON LOCATION

MINNEAPOLIS CONVENTION CENTER

1301 2nd Ave. South
Minneapolis, MN 55403

The in-person portion of the conference takes place at the Minneapolis Convention Center, Monday, Nov. 13-Tuesday, Nov. 14.

CHECK-IN

If you're registered for the hybrid event, please arrive at the Minneapolis Convention Center by 7:30 a.m. on Nov. 13 to check in and make your way to the first session. When you arrive, follow the signs directing you to the MNCPA registration desk on mezzanine level.

PARKING

Parking is available in a variety of ramps and surface lots near and connected to the Minneapolis Convention Center.

HOTEL

Take advantage of the group rate, $135-155/night (single/double occupancy), and stay at the Hyatt Regency Minneapolis for easy, quick access to the conference. Reserve a room online or call 877-803-7534 and **book your room before Oct. 23, 2023**. Reference Group Code G-MNCN when making your reservation. Availability is limited.

Hyatt Regency Minneapolis
1300 Nicollet Mall
Minneapolis, MN 55403

IN-PERSON EXCLUSIVE OPTIONS

Catch up with your peers at happy hour, Nov. 13, and enjoy a bonus speaker during the government relations lunch option, Nov. 14.

IMPORTANT NOTE ABOUT MATERIALS

Materials are provided electronically only. Printed handouts will not be available at the conference.

DATES AND TIME

Monday, Nov. 13-Wednesday, Nov. 15 | 8 a.m. – 5 p.m.

FORMAT/REGISTRATION OPTIONS

Hybrid & YP: day 1 & 2 in person + day 3 virtual (day 3 optional for YP track)
Virtual: day 1 & 2 livestream + day 3 virtual
Single day: choose which day works best for you (not available for YP track)

CODES

General conference: 23CF-TAXC
YP track: 23CF-TAXY

CONFERENCE APP

Access livestreamed and virtual sessions via the conference app.

Visit **www.mncpa.org/TaxConference/attending** to learn how to maximize your virtual conference experience.

CONTINUING EDUCATION

Credit amounts are based on attendance at all days of the conference unless otherwise noted.

For TAX23 Young Professionals Track CPE details visit **www.mncpa.org/TaxConference/yp**

CPE: 24 hours
See session descriptions for technical / non-technical fields of study.

Ethics: 4 hours available
To receive ethics credits, you must attend approved sessions: E1 (1.5 hours), H3 (1 hour) and P2 (1.5 hours)

CLE (Standard): Application pending

IRS CE: Application pending

CFP®: Application pending

Certified Financial Planner Board of Standards Inc. owns the certification marks CFP®, CERTIFIED FINANCIAL PLANNER™, CFP® (with plaque design) and CFP® (with flame design) in the U.S., which it awards to individuals who successfully complete CFP Board's initial and ongoing certification requirements.

Visit **www.mncpa.org/TaxConference/credits** for credit updates.

CONFERENCE WEBSITE

The official conference website provides the most up-to-date program information and answers to frequently asked questions.

Visit **www.mncpa.org/TaxConference** to view current conference details.

CANCELLATION AND REFUND POLICY

Receive a full refund if you cancel before Nov. 7, 2023.

ELECTRONIC MATERIALS ONLY

Printed materials will not be available at the event. Materials are provided electronically only. If you prefer printed materials, please print them before you arrive.

MEALS AND REFRESHMENTS

Meals and refreshments are provided to in-person attendees on Nov. 13 and 14, 2023. Sorry, food is not provided for livestream or virtual portions of the conference.

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ACCOMMODATION REQUESTS

Please notify the MNCPA if you have dietary requests or accessibility needs.

MNCPA IN-PERSON EVENTS

Your health and safety is our number one priority. For venue-specific details, visit **www.minneapolis.org/minneapolis-convention-center/safety-updates/**.

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Register by Oct. 27

YES! SIGN ME UP FOR THE MNCPA TAX CONFERENCE (TAX23):

Online: www.mncpa.org/TaxConference
Call: 952-831-2707

Email: Scan form below and email to: customerservice@mncpa.org

Mail: Minnesota Society of CPAs
1650 W. 82nd St., Suite 600
Bloomington, MN 55431

Name ______________________ Company ______________________

Address ______________________ City ____________ State ____________ Zip ____________

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General Conference Registration (choose one):

☐ Hybrid 1 & 2 in person + day 3 virtual
☐ Virtual (day 1 & 2 livestream + day 3 virtual)
Single day: ☐ Day 1 only — in person ☐ Day 2 only — in person ☐ Day 3 only — virtual
☐ Day 1 only — livestream ☐ Day 2 only — livestream

YP Track Registration (choose one):

☐ Day 1 & 2 in person
☐ Full conference

☐ My company is interested in sponsoring and/or exhibiting at this event. Please contact me with more information.

DIETARY RESTRICTIONS

☐ Vegetarian ☐ Vegan ☐ Gluten-free ☐ Food allergy ______________________
For in-person event attendees only.

GENERAL CONFERENCE FEES

BEST DEAL!

VIP RATE*	EARLY BIRD RATE	STANDARD RATE
$599 ~~$749~~ Members-only	$649 ~~$749~~ Members	$749 Members
	$949 ~~$1,049~~ Nonmembers	$1,049 Nonmembers
Register & pay by Friday, Oct. 20	Register by Friday, Oct. 27	

***VIP rate:** Must be an MNCPA member when you register and on the event date. To access the VIP rate and other member benefits, join the MNCPA!

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SPECIAL RATES

Young Professionals Track:
Nov. 13-14 only:
$399 MNCPA members / $629 nonmembers

Full conference:
$599 MNCPA members / $949 nonmembers
The YP track features special promotional pricing and does not qualify for VIP, early bird, first-time attendee or group registration discounts. YP track registration closes Oct. 20.

One day only pricing:
Early bird:
$449 MNCPA members / $549 nonmembers
Register by Oct. 27.

Standard:
$499 MNCPA members / $599 nonmembers

VIP, first-time attendee and multiple registration discounts are not available for one-day-only attendance.

First-time attendee:
$599 First-time rate available only to MNCPA members.

Contact us at 952-831-2707 or customerservice@mncpa.org to receive this rate. Online registration not available.

Group rate (expires Oct. 20):
$599 MNCPA members / $749 nonmembers

Group rate available for groups of 20 or more people from the same firm/company. Contact us at 952-831-2707 or customerservice@mncpa.org to receive this rate. Online registration not available.

SESSION SELECTIONS

In order to receive continuing education credits, you must submit this information.

Day 1: ☐ A1 ☐ B1 ☐ B2 ☐ B3 ☐ B4 ☐ C1 ☐ C2 ☐ C3 ☐ C4
☐ D1 ☐ D2 ☐ D3 ☐ D4 ☐ E1 ☐ E2 ☐ E3 ☐ E4 ☐ F1 ☐ F2 ☐ F3 ☐ F4
☐ Happy Hour (available in-person only)

Day 2: ☐ G1 ☐ G2 ☐ G3 ☐ G4 ☐ H1 ☐ H2 ☐ H3 ☐ H4 ☐ I1 ☐ I2 ☐ I3 ☐ I4
☐ Government Relations Lunch (available in-person only)
☐ J1 ☐ K1 ☐ K2 ☐ K3 ☐ K4 ☐ L1 ☐ L2 ☐ L3 ☐ L4

Day 3: ☐ M1 ☐ M2 ☐ M3 ☐ N1 ☐ N2 ☐ N3 ☐ O1 ☐ O2 ☐ O3
☐ P1 ☐ P2 ☐ P3 ☐ Q1 ☐ Q2 ☐ Q3 ☐ R1

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TAX23

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MNCPA TAX CONFERENCE

Nov. 13-14 | Minneapolis Convention Center or livestream
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NEW! YOUNG PROFESSIONALS TRACK