

TAX26 SCHEDULE

DAY ONE | MONDAY, NOV. 16

In-person or livestream

8-9 a.m.	A1. Quieting the Noise: Four Simple Choices to Live and Work On Purpose <i>Darren Root & John Mitchell</i>		
9:10-10:25 a.m.	B1. Unlocking the Secrets of a Tax Return <i>Sali Sheafor, CPA</i>	B2. The Trusted Tax Adviser's Guide to Small Business Retirement Plans <i>George Koutelieris, CPA Greg White, CPA</i>	B3. The Operating System for the Simple Firm: Choosing a Tech Stack On Purpose <i>Darren Root</i>
10:55 a.m.-12:10 p.m.	C1. Charitable Planning Toolkit: A CPA's Field Guide to Giving Vehicles <i>Kyle Wesely, CPA Mariah Brook</i>	C2. Federal Business Tax Highlights <i>George Koutelieris, CPA Greg White, CPA</i>	C3. Beyond the Courtesy Disconnect: Modern Tools to Resolve IRS Cases <i>Benjamin Wagner, JD</i> <i>Sponsored by Wagner Tax Law</i>
12:10-1 p.m.	Lunch <i>Sponsored by Newmark</i>		
1-2:15 p.m.	D1. Federal Individual Tax Highlights <i>George Koutelieris, CPA and Greg White, CPA</i>		
2:35-3:25 p.m.	E1. Next Level of Tax Efficient Investing <i>Carl Lymangood, CPA, CPWA®, CIMA®, CFP®</i>	E2. State Tax Nexus Expansion: Economic Presence, Remote Activities and P.L. 86-272 <i>Masha Yevzelman, JD</i>	E3. Airbnb vs. Traditional Rentals: Depreciation, Passive Losses and Tax Planning Insights <i>Ashley Sullivan</i> <i>Sponsored by MSC, LLC</i>
3:45-5 p.m.	F1. Minnesota Legislative and Professional Update <i>Geno Fragnito Linda Wedul, CAE</i>	F2. The Tax Return Review Playbook <i>Sali Sheafor, CPA</i>	F3. Economic Conditions in Minnesota and the U.S. <i>Joseph Mahon</i>
5-6 p.m.	Happy Hour <i>Sponsored by AMBA</i>		

TAX26 SCHEDULE

DAY TWO | TUESDAY, NOV. 17

In-person or livestream

8-9:15 a.m.	G1. Simple But Effective Individual Tax Planning Strategies <i>David Peters, CPA, CFP®, CLU, CPCU, MST, MBA</i>	G2. Complex Partnership K-1s: Interpretation, Preparation and Planning Opportunities <i>Susan Smith, CPA</i>	G3. Why Do Good People Sometimes Do Bad Things? Ethics and Professional Practice <i>Christopher Wong Michaelson, PhD</i>
9:35-10:25 a.m.	H1. Minnesota Department of Revenue <i>Commissioner Paul Marquart Geno Fragnito</i>	H2. New and Expanded Tax Benefits Associated with Section 1202 — Qualified Small Business Stock <i>Susan Smith, CPA</i>	H3. Helping Clients Navigate Buyers in Today's Market <i>Chris Jones</i> Sponsored by Sunbelt Business Advisors and True North Mergers & Acquisitions
10:45 a.m.-noon	I1. Beyond Wills: Trusts and Other Estate Planning Tools <i>Claudia Revermann, JD, CPA</i>	I2. Common Tax Challenges in Pass-Through Businesses <i>Susan Smith, CPA</i>	I3. Become a Tax Superhero: Uncovering Hidden Tax Incentives <i>Todd French</i> Sponsored by Capstan Tax Strategies
Noon-12:50 p.m.	Lunch sponsored by Newmark Optional: Government Relations Lunch		
12:50-2:05 p.m.	J1. Basis Calculations for S Corps and Partnerships <i>David Peters, CPA, CFP®, CLU, CPCU, MST, MBA</i>	J2. Partnership & LLC: From Formation to Liquidation <i>Pat Garverick, CPA</i>	J3. The Clear Path Ahead: Vision, Strategy and Unwavering Execution <i>Sandra Wiley</i>
2:25-3:40 p.m.	K1. Tax Planning Meets Legacy Planning: Designing Wealth That Outlives You <i>Lynita Mitchell-Blackwell, Esq., CPA</i>	K2. Navigating Stock Options and Executive Compensation: Key Tax Compliance and Planning Strategies <i>Derek Dockendorf, CPA, CFP®</i>	K3. 2026 Minnesota Income Tax Update <i>Dan Kidney, CPA</i>
4-4:50 p.m.	L1. Character Driven Leadership <i>Joe Cavanaugh</i>		