

A stylized background featuring a bright yellow sun with an orange glow in the top right corner. Several white, fluffy clouds are scattered across a solid blue sky. At the bottom of the image, there is a thick, layered band of white and light blue clouds.

FORECAST: 100% CHANCE OF TAX TAX25

MNCPA Tax Conference

November 17-18 | Minneapolis Convention Center or virtual

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| DAY ONE MONDAY, NOV. 17 In-Person or Virtual | | | |
|---|--|---|--|
| 8-9:05 a.m. | A1. AICPA Profession Opportunities Update <i>Lisa Simpson</i> Specialized Knowledge - Technical (1) YP FRIENDLY | | |
| 9:25-10:40 a.m. | B1. Federal Individual Tax Highlights <i>George Koutelieris</i> <i>Greg White</i> Taxes - Technical (1.5) CFP IRS CE | B2. Calculating Debt Basis: S-Corps vs. Partnerships <i>David Peters</i> Taxes - Technical (1.5) CFP IRS CE | B3. Getting In Front of Today's Staffing Challenges <i>Will Hill</i> Personnel/Human Resources - Non-Technical (1.5) |
| 11 a.m.-12:15 p.m. | C1. Helping Your Clients Plan for a Tax-Free Retirement <i>Barry Schalkle</i> Taxes - Technical (1.5) CFP IRS CE | C2. Federal Business Tax Highlights <i>George Koutelieris</i> <i>Greg White</i> Taxes - Technical (1.5) CFP IRS CE | C3. Renewable Energy Tax Credits & Incentives: What You Need to Know <i>Michael Warady</i> Taxes - Technical (1.5) <i>Sponsored by Tri-Merit</i> CFP IRS CE |
| 12:15-1 p.m. | LUNCH EXHIBITS | | |
| 1-1:50 p.m. | D1. R&D, Cost Segregation and More Under the OBBBA <i>Lester Cook</i> <i>Kyle Ernsberger</i> Taxes - Technical (1) <i>Sponsored by KBKG</i> CFP IRS CE | D2. Get Aligned: What Your Firm Can Learn From the Chiropractor <i>Will Hill</i> Business Management & Organization - Non-Technical (1) | D3. Ethics Update: Emerging Issues and Key Developments <i>Charles Selcer</i> Regulatory Ethics - Technical (1) ETHICS |
| 2:10-3:25 p.m. | E1. Federal Estate/Gift Tax w/GST <i>Tara Torseth</i> Taxes - Technical (1.5) CFP IRS CE | E2. 2025 Minnesota Income Tax Update <i>Dan Kidney</i> Taxes - Technical (1.5) CFP | E3. State Income Tax Apportionment and Sourcing <i>Masha Yevzelman</i> Taxes - Technical (1.5) CFP |
| 3:45-5 p.m. | F1. Minnesota Legislative and Professional Update: What's Now, What's Next <i>Geno Fragnito</i> <i>Linda Wedul</i> Business Management & Organization - Non-Technical (1.5) | F2. Selling a Business: A Practical Guide for CPAs as Advisers to Business Owners <i>Dan Mulvaney</i> Specialized Knowledge - Technical (1.5) <i>Sponsored by Sunbelt Business Advisors and True North Mergers & Acquisitions</i> | F3. Now What? Economy in Flux <i>Dr. Christopher Kuehl</i> Economics - Technical (1.5) CFP |
| 5-6 p.m. | Happy Hour <i>Sponsored by AMBA, OneNet Global and Ryan, LLC</i> | | |



Register Today!

TAX25 YOUNG PROFESSIONALS TRACK

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New to 2025, the YP Track has two levels! See pages 12-13 for details.

Learn more at www.mncpa.org/TaxConference/YP.

DAY TWO | TUESDAY, NOV. 18
In-Person or Virtual

| | | | |
|-----------------------|--|--|--|
| 7-7:50 a.m. | Y1. Bonus Session: Minnesota Department of Revenue and Our Valued Partnership With MNCPA <i>Commissioner Paul Marquart</i> Specialized Knowledge - Technical (1) | | |
| 8-9 a.m. | G1. Artificial Intelligence for Tax Professionals <i>Susan Smith</i> Information Technology - Technical (1) CFP | G2. The SECURE Act 2.0 and the One Big Beautiful Bill: What to Know and What to Do <i>Barry Schalkle</i> Taxes - Technical (1) CFP IRS CE | G3. Farm Tax Update <i>Paul Neiffer</i> Taxes - Technical (1) CFP IRS CE |
| 9:20-10:35 a.m. | H1. Federal Individual Tax Highlights (Repeat of B1) <i>George Koutelieris</i> <i>Greg White</i> Taxes - Technical (1.5) CFP IRS CE | H2. Estate Planning Unpacked: Wills, All the Trusts and Why It Matters <i>Claudia Revermann</i> Specialized Knowledge - Technical (1.5) CFP | H3. Foreign Tax Credits & Form 1116: Fundamentals and Strategies for U.S. Taxpayers <i>Aaron Boyer</i> Taxes - Technical (1.5) CFP IRS CE |
| 10:55 a.m.-12:10 p.m. | I1. Key Topics in OBBBA: A Deeper Dive <i>Susan Smith</i> Taxes - Technical (1.5) CFP IRS CE | I2. "Oh, You're a Tax Lawyer?" Questions From Happy Hours and So Much More <i>Alex Korzhen</i> <i>Kathleen E. Splett Pfitzenreuter</i> <i>Benjamin Wagner</i> Taxes - Technical (1.5) <i>Sponsored by Wagner Tax Law</i> | I3. Excel Update 2025 <i>Tommy Stephens</i> Computer Software & Applications - Non-Technical (1.5) |
| 12:10-1 p.m. | LUNCH GOVERNMENT RELATIONS LUNCH (registration required) EXHIBITS | | |
| 1-2:15 p.m. | J1. Minnesota Estate Tax Update <i>Tara Torseth</i> Taxes - Technical (1.5) CFP | J2. Federal Business Tax Highlights (Repeat of C2) <i>George Koutelieris</i> <i>Greg White</i> Taxes - Technical (1.5) CFP IRS CE | J3. Working More Effectively With PDF Documents <i>Tommy Stephens</i> Computer Software & Applications - Non-Technical (1.5) |
| 2:35-3:50 p.m. | K1. Charitable Remainder Trusts in Practice: Advanced Strategies & Identifying Candidates <i>Luther Ranheim</i> <i>Kyle Wesely</i> Specialized Knowledge - Technical (1.5) CFP | K2. 2025 Minnesota Income Tax Update (Repeat of E2) <i>Dan Kidney</i> Taxes - Technical (1.5) | K3. Cracking the K-1 Code: Deep Dive Into Interpretation, New Codes and Complex Items <i>Danielle Tewes</i> Taxes - Technical (1.5) CFP IRS CE |
| 4:10-5 p.m. | L1. The Art of Roth Conversions <i>George Koutelieris</i> <i>Greg White</i> Specialized Knowledge - Technical (1) CFP IRS CE | L2. Building a Sustainable Tax Practice Through Ethics <i>Sharyn Fisk</i> Regulatory Ethics - Technical (1) ETHICS IRS CE | L3. Collaboration Tools <i>Tommy Stephens</i> Computer Software & Applications - Non-Technical (1) |



"Always useful information.
Good speakers and great value for CPE."
-2024 attendee

| DAY THREE WEDNESDAY, NOV. 19 | | | |
|--------------------------------|---|---|--|
| Virtual Only | | | |
| 7-7:50 a.m. | Z1. Bonus Session: The One Big Beautiful Bill Act: What It Means for Section 174 and R&D Tax Benefits <i>Les Bryson and Ashley Sullivan</i> Taxes - Technical (1) Sponsored by MSC, LLC CFP IRS CE | | |
| 8-9:25 a.m. | M1. AdvisorSmart for CPAs: Your Guide to Helping Clients Choose Better Financial Advisors <i>David Bromelkamp</i> Specialized Knowledge - Technical (1.5) | M2. AI Tax Research Software Showcase <i>Moderator, Tommy Stephens</i> <i>David Haase, Juno</i> <i>Kevin Boeckholt, TaxGPT</i> <i>Nate Jones, Wolters Kluwer</i> Computer Software & Applications - Non-Technical (1.5) | M3. The Ethics of AI: Navigating the Future of Responsible Innovation <i>Leah Donti</i> Behavioral Ethics - Non-Technical (1.5) ETHICS YP FRIENDLY |
| 9:40-10:30 a.m. | N1. College Planning Disrupted: Need-to-Know Changes from the One Big Beautiful Bill Act <i>Cozy Wittman</i> Specialized Knowledge - Technical (1) CFP | N2. Self-Employment Taxes for Partners: Are All Partners Tested Under a Functional Analysis <i>Ed Zollars</i> Taxes - Technical (1) CFP IRS CE YP FRIENDLY | N3. The 40-Hour Firm: From Deadline Stress to Firm Freedom With a Subscription Business Model <i>Shannon Vincent</i> Business Management & Organization - Non-Technical (1) |
| 10:45 a.m.-noon | O1. BBA Partnership Exams and AARs: Ten Years on from the Bipartisan Budget Act of 2015 <i>Ed Zollars</i> Taxes - Technical (1.5) IRS CE | O2. General Risk Management Tips and Techniques for Protecting Your Practice <i>Duncan Will</i> Management Services - Technical (1.5) | O3. Technology Update <i>Tommy Stephens</i> Information Technology - Technical (1.5) YP FRIENDLY |
| Noon-12:40 p.m. | LUNCH BREAK | | |
| 12:40-1:55 p.m. | P1. Enhance Your Understanding of Social Security and Medicare Eligibility <i>Brian Rudolph</i> Specialized Knowledge - Technical (1.5) CFP | P2. Choosing the Best Retirement Plan for Small Business Clients <i>George Koutelieris</i> <i>Greg White</i> Specialized Knowledge - Technical (1.5) CFP IRS CE YP FRIENDLY | P3. AI Tools — Microsoft Copilot <i>Tommy Stephens</i> Computer Software & Applications - Non-Technical (1.5) YP FRIENDLY |
| 2:10-3:25 p.m. | Q1. Smarter Philanthropy: How to Leverage Donor-Advised Funds for Greater Impact <i>David Bromelkamp</i> Specialized Knowledge - Technical (1.5) | Q2. Key Tax Changes Found in the One Big Beautiful Bill Act (OBBA) <i>Ed Zollars</i> Taxes - Technical (1.5) CFP IRS CE YP FRIENDLY | Q3. Protect Your Practice: Cybersecurity Made Simple for CPA Tax Firms <i>Leah Donti</i> Information Technology - Technical (1.5) |
| 3:40-4:30 p.m. | R1. What's Your "And"? A People-Centric Approach to Leadership <i>John Garrett</i> Personal Development - Non-Technical (1) YP FRIENDLY | | |

7-8 a.m. | Check-in, Continental Breakfast

8-9:05 a.m. | Keynote Session A

A1. AICPA Profession Opportunities Update

Lisa Simpson, American Institute of Certified Public Accountants



Lisa Simpson, AICPA VP-Firm Services has a front row seat to developments in the accounting and finance profession. Hear the latest updates on the profession. Dive into the business model changes that firms should consider in a rapidly changing environment.

FOS: Specialized Knowledge - Technical (1)

YP FRIENDLY

9:05-9:25 a.m. | Break and Exhibits

9:25-10:40 a.m. | Breakout Sessions B

B1. Federal Individual Tax Highlights

George Koutelieris, CPA, MS-Tax, Johnson & Shute, PS
Greg White, WGN, PS

The most significant tax legislation in nearly a decade — the “One Big Beautiful Bill Act” — was passed in July, introducing sweeping changes that will impact both individuals and businesses. Take a deep dive into selected provisions of the Act, focusing on new opportunities and challenges for taxpayers. Gain insights on the introduction of deductions for personal car loan interest expense, overtime and tips, as well as critical updates surrounding the “Rothification” of 401(k) catch-up contributions.

FOS: Taxes - Technical (1.5)

B2. Calculating Debt Basis: S-Corps vs. Partnerships

David Peters, CPA, CGMA, CPCU, ChFC, CLU, CFP®, Peters Professional Education

Debt allocations can provide tax advantages for partners and S-Corporation shareholders alike. While the calculations are similar for partnerships and S-Corporations, they result in different tax consequences. Explore the unique attributes of each with easy-to-follow examples, examining recourse and nonrecourse debt, the relationship between distributions and debt allocations, as well as distinctions between the basis calculations.

FOS: Taxes - Technical (1.5)

B3. Getting in Front of Today's Staffing Challenges

Will Hill, MBA, Will Hill Consults LLC

While the volume of staff shuffling between firms from 2021-2023 has calmed, firms today are still left trying to staff appropriately. Conventional hiring places and tactics may still bring new faces through the door, but are they the right fit? Dive into some different approaches and tactics to filling staffing needs at your firm.

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

10:40-11 a.m. | Break and Exhibits

11 a.m.-12:15 p.m. | Breakout Sessions C

C1. Helping Your Clients Plan for a Tax-Free Retirement

Barry Schalkle, CPA, Strategic Wealth Planning Group

Explore how to help clients take advantage of a short but critical window in the current tax code to optimize retirement assets and create tax-free income for the future. Learn how to navigate existing provisions before anticipated tax changes negatively impact retirees' income. Gain a new perspective on the intersection of tax planning today versus waiting until retirement.

FOS: Taxes - Technical (1.5)

C2. Federal Business Tax Highlights

George Koutelieris, CPA, MS-Tax, Johnson & Shute, PS
Greg White, WGN, PS

The One Big Beautiful Bill Act brings sweeping changes to business taxation. Learn the key provisions CPAs need to know for 2025. Explore the outcome of the proposed pass-through entity tax (PTET) restrictions, updates to the Section 199A 20% QBID deduction and important changes to the excess business loss (EBL) limitation. Dive into the newly expanded credit for employer-paid FICA taxes, revised requirements for filing Forms 1099-MISC and 1099-NEC and updates to the research deduction. Also, discuss a significant new case addressing the applicability of self-employment tax to LLC members and limited partners.

FOS: Taxes - Technical (1.5)

C3. Renewable Energy Tax Credits & Incentives: What You Need to Know

Michael Warady, Tri-Merit, LLC

The One Big Beautiful Bill Act introduces sweeping changes to renewable energy tax incentives, creating tax planning challenges and opportunities. Explore key provisions, including updates to depreciation and MACRS, the termination of the 179D and 45L programs, changes to Qualified Renewable Energy Programs and the phase-out timeline of ITC and PTC credits. Also, explore important monetization process updates, including elective tax payment under IRC 6417 and credit transferability under IRC 6418, with time for Q&A.

FOS: Taxes - Technical (1.5)

Session presented and sponsored by Tri-Merit

12:15-1 p.m. | Lunch and Exhibits

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

D1. New Era of Tax Incentives: R&D, Cost Segregation and More Under the One Big Beautiful Bill

Lester Cook, KBKG Midwest Region
Kyle Ernsberger, KBKG Midwest Region

Stay ahead of the most impactful tax changes with KBKG's 2025 Tax Update, a comprehensive presentation tailored to address the sweeping reforms introduced by the One Big Beautiful Bill (H.R. 1). Designed for tax professionals, CFOs and business advisors, this presentation offers deep insights into how recent legislative changes reshape the landscape of federal tax incentives and deductions.

FOS: Taxes - Technical (1)

Session presented and sponsored by KBKG

D2. Get Aligned: What Your Firm Can Learn From the Chiropractor

Will Hill, MBA, Will Hill Consults LLC

As firms attempt to keep pace with the rapid changes in environments (clients, legal, staffing, technology) the firm starts to feel pain. Technology changes don't have the impact they are looking for, while law changes leave the firm scrambling to keep up. When we stop and look around, we see a well-intentioned firm but one that is misaligned and disjointed. Explore the key components of firm alignment, how to spot misalignment and strategies to bring the firm back into alignment.

FOS: Business Management & Organization - Non-Technical (1)

D3. Ethics Update: Emerging Issues and Key Developments

*Charles Selcer, CPA, CGMA, MBA,
Schechter Dokken Kanter CPAs*

Gain an essential update on current ethics issues impacting the profession, including private equity ownership of firms, the growing role of executive search services, recent enforcement matters and evolving pathways to licensure. Explore timely insights into the regulatory landscape, professional responsibilities and practical considerations that shape how CPAs serve their clients and firms.

FOS: Regulatory Ethics - Technical (1)

ETHICS **YP FRIENDLY**

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

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

E1. Federal Estate/Gift and Generation-Skipping Transfer (GST) Tax

Tara Torseth, CPA, MBT, ABDO, LLP

Dive into an essential and timely training on the complex world of Federal Estate, Gift and Generation-Skipping Transfer (GST) Tax. Designed for CPAs, financial advisors, attorneys and other professionals working in estate and wealth planning, this session provides a comprehensive overview of current rules, planning strategies and recent developments.

FOS: Taxes - Technical (1.5)

E2. 2025 Minnesota Income Tax Update

Dan Kidney, CPA, JD, Wipfli, LLP

While Minnesota's 2025 spring legislative session made only modest changes to the state's tax code, a fall special session is expected to address Minnesota's conformity to the federal tax law changes in the One Big Beautiful Bill Act (OBBBA) enacted in July. Dive into potential tax law changes for Minnesota. Also, explore the ramifications of the Minnesota Supreme Court's expected ruling in Humana MarketPoint that will provide the first interpretation of Minnesota's market-sourcing apportionment statute in its 30-year existence.

FOS: Taxes - Technical (1.5)

E3. State Income Tax Apportionment and Sourcing

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

Unlock the complexities of state income tax apportionment and sourcing. Whether you're navigating multi-state filings, advising clients on compliance strategies, or helping clients through state tax audits, gain practical insights and up-to-date guidance on multi-state apportionment and sourcing rules, trends in state audit positions and how apportionment and sourcing rules are being interpreted by courts.

FOS: Taxes - Technical (1.5)

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

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

F1. Minnesota Legislative and Professional Update: What's Now, What's Next

*Geno Fragnito, Minnesota Society of CPAs
Linda Wedul, CAE, Minnesota Society of CPAs*

Get an insider's view of the legislative and regulatory developments shaping the future of the CPA profession. Explore the latest updates from the Minnesota Board of Accountancy, key legislative highlights and the latest on the MNCPA's leadership role in advancing national licensure reform. Learn how the MNCPA advocates on your behalf at the Capitol and behind the scenes with regulatory bodies. Also, explore fast-moving trends and emerging issues, from alternative practice structures to the growing impact of artificial intelligence — equipping you with the knowledge you need to make informed decisions for your firm and clients.

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

F2. Selling a Business: A Practical Guide for CPAs as Advisors to Business Owners

Dan Mulvaney, True North Mergers & Acquisitions

CPAs are in a unique position as the trusted long-term strategic advisor to their business owner clients. Dive into today's mergers and acquisitions industry for the lower middle market and main street businesses. This session focuses on the sell-side perspective, including interactive topics for CPAs to consider as they advise their clients' sale processes.

FOS: Specialized Knowledge - Technical (1.5)

Session presented and sponsored by Sunbelt Business Advisors and True North Mergers & Acquisitions

F3. Now What? Economy in Flux

Dr. Christopher Kuehl, Armada Corporate Intelligence

It has been a year of significant change and transition, leaving many uncertainties about the current state of the economy. While major tax decisions have been made, important details remain unresolved, and questions about tariff and trade policy continue to loom. Explore potential scenarios for the economy heading into late 2025 and 2026, focusing on key factors such as inflation, growth, interest rates, workforce trends and other critical economic issues that will shape the business landscape.

FOS: Economics - Technical (1.5)

5-6 p.m. | Happy Hour (Registration suggested)

Sponsored by AMBA, OneNet Global and Ryan, LLC

6:30-8 a.m. | Check-in, Continental Breakfast

7-7:50 a.m. | Bonus Session

Y1. Bonus Session: Minnesota Department of Revenue and Our Valued Partnership With MNCPA

Commissioner Paul Marquart, Minnesota Department of Revenue

Discover what's new at the Minnesota Department of Revenue, from key tax updates, federal conformity, tips for better tax prep and upcoming initiatives — all designed to support CPAs and strengthen our partnership with the MNCPA.

FOS: Specialized Knowledge - Technical (1)

YP FRIENDLY

8-9 a.m. | Breakout Sessions G

G1. Artificial Intelligence for Tax Professionals

Susan Smith, Surgent

Artificial Intelligence tools are revolutionizing the tax industry, transforming the way tax professionals manage compliance, planning and advisory services. As AI technology continues to evolve, it presents both opportunities and challenges for tax professionals looking to stay ahead in a rapidly changing regulatory environment.

FOS: Information Technology - Technical (1)

G2. The SECURE 2.0 Act and the One Big Beautiful Bill: What to Know and What to Do

Barry Schalkle, CPA, Strategic Wealth Planning Group

Recent legislative changes, including the SECURE 2.0 Act and the One Big Beautiful Bill Act, have introduced provisions that open new opportunities for clients in both tax and retirement planning. Gain an accessible overview of the most important updates, highlighting how these changes can benefit clients and create valuable planning conversations. Dive into retirement planning strategies, learn how to apply key provisions in practice and leave equipped to add meaningful value for clients — while also enhancing firm growth through increased revenue and referrals.

FOS: Taxes - Technical (1)

G3. Farm Tax Update

Paul Neiffer, CPA

Review how the One Big Beautiful Bill Act will affect farmers' tax situation for 2025 and related planning opportunities. Also, explore any pertinent cases and rulings that farmers need to know.

FOS: Taxes - Technical (1)

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

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

H1. Federal Individual Tax Highlights (Repeat of B1)

*George Koutelieris, CPA, MS-Tax, Johnson & Shute, PS
Greg White, WGN, PS*

Repeat of B1. See B1 for full session description.

FOS: Taxes - Technical (1.5)

H2. Estate Planning Unpacked: Wills, All the Trusts and Why It Matters

Claudia Revermann, CPA, Attorney at Law, Revermann Lund Ross

Unpack estate planning tools — wills, revocable and irrevocable trusts, and grantor vs. non-grantor structures — with a high-level look at their function and significance. Learn to spot planning gaps, decode terminology and navigate common client misconceptions. Through real-world examples, learn key concepts so you can communicate clearly and confidently with clients and their attorneys.

FOS: Specialized Knowledge - Technical (1.5)

H3. Foreign Tax Credits & Form 1116: Fundamentals and Strategies for U.S. Taxpayers

Aaron Boyer, CPA, Eide Bailly, LLP

Navigating the U.S. foreign tax credit (FTC) rules is critical for tax professionals advising clients with foreign income. Gain a practical overview of Form 1116, covering eligible foreign taxes and key limitations. Learn the impact of accounting methods, deductions vs. credits and Schedule K-3. Explore strategies for carrybacks and carryovers and gain actionable guidance to resolve common FTC issues for individual taxpayers.

FOS: Taxes - Technical (1.5)

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

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

I1. Key Topics in OBBBA: A Deeper Dive

Susan Smith, Surgent

The One Big Beautiful Bill Act (OBBBA) marks the most significant tax code overhaul since the Tax Cuts and Jobs Act (TCJA). Dive into one or more OBBBA topics, possibly including: Trump Accounts (new tax-favored savings accounts to support children); tip and overtime pay deductions, resulting in tax savings for qualifying taxpayers; and the car loan interest deduction.

FOS: Taxes - Technical (1.5)

I2. "Oh, You're A Tax Lawyer?" Questions From Happy Hours and So Much More

Alex Korzhen, MBA, JD, Wagner Tax Law

*Kathleen E. Splett Pfitzenreuter, JD, Tax Attorney, Wagner Tax Law
Benjamin Wagner, JD, Wagner Tax Law*

Tax controversy attorneys field a wide range of questions from their accounting colleagues — from residency and personal liability to nexus and other current hot-button issues. Explore the most common areas of confusion, providing clarity and practical insight into the controversial topics shaping today's tax landscape.

FOS: Taxes - Technical (1.5)

Session presented and sponsored by Wagner Tax Law

I3. Excel Update 2025

Tommy Stephens, CPA, CITP, CGMA, K2 Enterprises

Excel remains the business professional's tool of choice, yet most of these same professionals remain unaware of key new features. Learn critical new features that have been added to Excel to help you work more efficiently and effectively. Dive into Excel's PIVOTBY and GROUPBY functions, enhanced integration with Copilot, Sheet Views, in-cell Checkboxes and Focus cells. Also, learn to use several PivotTable features that most users remain unaware of.

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

YP FRIENDLY

12:10-1 p.m. | Main Lunch | Exhibitors
Government Relations Lunch (*Registration required*)

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

J1. Minnesota Estate Tax: Planning Strategies and Compliance Essentials

Tara Torseth, CPA, MBT, ABDO, LLP

Minnesota is one of the few states that continues to impose a separate estate tax — and navigating its complexities is critical for advisors with clients who live in, own property in, or plan to move to Minnesota. Dive into Minnesota's estate tax structure, learning key differences from the federal system and practical strategies to reduce state-level estate tax exposure. Whether you're advising high-net-worth individuals or helping families preserve assets across generations, understanding the nuances of Minnesota estate tax law is essential.

FOS: Taxes - Technical (1.5)

J2. Federal Business Tax Highlights (Repeat of C2)

George Koutelieris, CPA, MS-Tax, Johnson & Shute, PS
Greg White, WGN, PS

Repeat of C2. See C2 for full session description.

FOS: Taxes - Technical (1.5)

J3. Working More Effectively with PDF Documents

Tommy Stephens, CPA, CITP, CGMA, K2 Enterprises

Portable Document Format (PDF) documents are everywhere! Yet few know how to work effectively with these documents. Learn valuable tips you can use to assist you with creating, editing and securing PDFs. Don't miss this chance to learn ten PDF tips you need to know to increase your ROI on PDFs.

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

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

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

K1. Charitable Remainder Trusts in Practice: Advanced Strategies & Identifying Candidates

Luther Ranheim, Saint Paul and Minnesota Foundation
Kyle Wesely, CPA, Wesely & Wesely CPAs Ltd.

Gain advanced insights into Charitable Remainder Trusts (CRTs), focusing on when and how to apply them in complex client situations. Explore strategies for planning with real estate, illiquid assets and IRAs, as well as considerations for income beneficiaries seeking early exits. Learn to recognize client characteristics, life events and asset scenarios that signal when a CRT is an effective philanthropic and legacy planning tool. Also, explore the CRT provider landscape, with special emphasis on the role of Community Foundations in fostering donor engagement, preserving legacy and ensuring long-term stewardship.

FOS: Specialized Knowledge - Technical (1.5)

K2. 2025 Minnesota Income Tax Update (Repeat of E2)

Dan Kidney, CPA, JD, Wipfli, LLP

Repeat of E2. See E2 for full session description.

FOS: Taxes - Technical (1.5)

K3. Cracking the K-1 Code: A Deep Dive Into Interpretation, New Codes and Complex Items

Danielle Tewes, CPA, K1x, Inc.

Build confidence and efficiency in reviewing and interpreting K-1s by learning how to analyze K-1s from the recipient's perspective, apply new and updated codes and address complex or less common crossover items between individual and business returns. With a focus on practical strategies, understand how to streamline the K-1 review process — saving time, reducing errors and improving reporting accuracy for clients.

FOS: Taxes - Technical (1.5)

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

4:10-5 p.m. | Breakout Sessions L

L1. The Art of Roth Conversions

George Koutelieris, CPA, MS-Tax, Johnson & Shute, PS
Greg White, WGN, PS

Roth conversions remain one of the most powerful yet underutilized tools in tax planning. Learn how to identify the best years to convert to Roth IRAs, determine which spouse should make a conversion and choose the most effective beneficiaries for both Roth and traditional IRAs. Also, explore strategies such as backdoor Roths to boost tax-free retirement income and provide guidance on computing the taxable portion of conversions.

FOS: Specialized Knowledge - Technical (1)

L2. Building a Sustainable Tax Practice Through Ethics

Sharyn Fisk, JD, LLM, Cal Poly Pomona

Building a sustainable tax practice requires more than technical expertise: it demands a careful balance of ethical compliance, risk management and strong client relationships. Gain a practical, comprehensive approach to integrating Circular 230 requirements throughout the client engagement lifecycle. Learn how to transform professional responsibility obligations into opportunities for practice growth while protecting both practitioner and client interests. Through proven best practices, discover how to build a robust practice foundation that supports long-term success.

FOS: Regulatory Ethics - Technical (1)

ETHICS

L3. Collaboration Tools

Tommy Stephens, CPA, CITP, CGMA, K2 Enterprises

Collaboration remains one of today's hottest topics. Technology has fueled today's collaboration options, and work-from-anywhere environments virtually demand collaboration platforms. Explore today's mainstream collaboration platforms like Microsoft 365, Google Workspace and Zoho. Learn about other collaboration options, including Slack, Zoom and Webex, so you can incorporate these tools into your collaboration environments. Further, gain some of the best practices and procedures that must be in place to optimize your collaborative environments and experiences.

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

7-7:50 a.m. | Bonus Session

Z1. Bonus Session: The One Big Beautiful Bill Act: What It Means for Section 174 and R&D Tax Benefits

Les Bryson, MSC
Ashley Sullivan, MSC

Learn how you can help your clients maximize credits and deductions with O-B-3. Review a range of examples and tailored strategies designed to increase your clients' cash flow and reduce income taxes starting now. Focused topics will include updates to Bonus Depreciation and the R&D Tax Credit as well as an introduction of Qualified Production Property (QPP).

FOS: Taxes - Technical (1)

YP FRIENDLY

Session presented and sponsored by MSC, LLC

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

M1. AdvisorSmart for CPAs: Your Guide to Helping Clients Choose Better Financial Advisors

David Bromelkamp, Allodium Investment Consultants

As a trusted CPA, your clients often seek guidance beyond taxes, including selecting a financial advisor. But how can you confidently help clients identify truly fiduciary professionals who put their interests first? Gain actionable strategies for guiding your clients through the complexities of choosing the right financial advisor. Learn what distinguishes fiduciary advisors from sales-oriented financial professionals, recognize common conflicts of interest and apply AdvisorSmart's proven five-step financial advisor selection process.

FOS: Specialized Knowledge - Technical (1.5)

M2. Software Showcase: AI Tax Research

Moderator, Tommy Stephens, CPA, CITP, CGMA, K2 Enterprises
David Haase, Juno
Kevin Boeckholt, TaxGPT
Nate Jones, Wolters Kluwer

This moderated session brings together leading AI tax research providers Juno, TaxGPT and Wolters Kluwer, for a side-by-side look at their systems. Through live demos and guided discussion, gain a clearer understanding of core features, functionality and the benefits AI tax research can bring to your organization.

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

M3. The Ethics of AI: Navigating the Future of Responsible Innovation

Leah Donti, CPA, MBA, Advantage Montreal Seminars, Inc.

Artificial intelligence is reshaping the world at an unprecedented pace, but with great power comes great responsibility. Explore the ethical dilemmas and challenges that come with AI's rapid advancement. From privacy concerns and bias in algorithms to accountability and societal impact, dive into the critical questions shaping the future of AI. Gain valuable insights into fostering ethical practices in AI development and application and discover how to balance innovation with humanity.

FOS: Behavioral Ethics - Non-Technical (1.5)

ETHICS

YP FRIENDLY

9:25-9:40 a.m. | Break

9:40-10:30 a.m. | Breakout Sessions N

N1. College Planning Disrupted: Need-to-Know Changes from the One Big Beautiful Bill

Cozy Wittman, College Inside Track

The One Big Beautiful Bill Act (OBBBA) has significantly reshaped college planning and will require new strategies for parents and grandparents. Student loan and parent loan rules for both undergrad and grad students have changed, 529 Plans have been expanded and financial aid families receive from colleges will be affected. Learn to navigate the new college planning landscape.

FOS: Specialized Knowledge - Technical (1)

N2. Self-Employment Taxes for Partners: Are All Partners Tested Under a Functional Analysis

Edward Zollars, CPA

The IRS has recently applied the functional analysis test for self-employment income — first outlined in Renkemeyer, Campbell & Weaver, LLP, 136 T.C. 137 (2011) — to state law limited partnerships. Review current cases (Soroban Capital Partners, LP; Sirius Solutions LLLP; Denham Capital), what the functional test entails, how to apply it in practice, and the potential impact on partnership clients.

FOS: Taxes - Technical (1)

YP FRIENDLY

N3. The 40-Hour Firm: From Deadline Stress to Firm Freedom With a Subscription Business Model

Shannon Vincent, Renew Group

Most accounting firms are stuck in an outdated, reactive model — constantly juggling unfinished work and persistent staffing challenges. The answer isn't small tweaks. What's needed is a true business model transformation: redefining pricing, services, ideal clients and success metrics to build a firm that works for leaders and teams. Discover how forward-thinking firms have shifted to stronger, more sustainable business models.

FOS: Business Management & Organization - Non-Technical (1)

10:30-10:45 a.m. | Break

10:45 a.m.-noon | Breakout Sessions O

O1. BBA Partnership Exams and AARs: Ten Years on From the Bipartisan Budget Act of 2015

Edward Zollars, CPA

It has now been over ten years since the enactment of the Bipartisan Budget Act of 2015. Review of the BBA audit rules, what entities can opt-out of these rules, why a partnership should consider opting out and the partnership representative's choice between paying tax at the entity level or undertaking the work to handle a push-out adjustment.

FOS: Taxes - Technical (1.5)

O2. General Risk Management Tips and Techniques for Protecting Your Practice

Duncan Will, CPA, ABV, CFF, CFE, CAMICO

Learn to protect personal and firm reputations by spotting risks, applying defenses and meeting client expectations while boosting profitability. Review new standards, peer review updates, recent tax laws, documentation practices, ethical dilemmas and lessons from "claim chronicles" and CAMICO's Loss Prevention Hotline.

FOS: Management Services - Technical (1.5)

03. Technology Update

Tommy Stephens, CPA, CITP, CGMA, K2 Enterprises

Technology — an indispensable asset — continues to amaze and mature. However, keeping up with advances in Artificial Intelligence, collaboration tools, new features in common tools such as Excel and the expansion of business intelligence platforms can seem like a full-time job! Learn about these and other technologies that can help you and your team reach levels of productivity you may have never dreamed possible.

FOS: Information Technology - Technical (1.5)

YP FRIENDLY

Noon-12:40 p.m. | Lunch

12:40-1:55 p.m. | Breakout Sessions P

P1. Enhance Your Understanding of Social Security and Medicare Eligibility

Brian Rudolph, Social Security Administration

More than 70 million Americans rely on Social Security as part of their retirement income, yet many remain unsure of the best claiming strategies. Explore filing options and learn how financial professionals can guide clients — whether single, married, divorced, or widowed — toward the best decisions for their situation. Learn how to maximize benefits through strategies like suspending payments for delayed retirement credits, understand spousal and family benefits and navigate Medicare Parts A–D, including IRMAA and premium adjustments.

FOS: Specialized Knowledge - Technical (1.5)

P2. Choosing the Best Retirement Plan for Small Business Clients

George Koutelieris, CPA, MS-Tax, Johnson & Shute, PS
Greg White, WGN, PS

Small business owners have more retirement plan options than ever, but choosing the right one requires careful analysis of each client's goals and circumstances. Learn to confidently compare and recommend plans such as SEP-IRAs, SIMPLE IRAs, 401(k)s, Roth and Traditional IRAs, and defined benefit plans. Understand how to evaluate payroll implications, calculate maximum deductions and identify the most advantageous plan based on client needs.

FOS: Specialized Knowledge - Technical (1.5)

YP FRIENDLY

P3. AI Tools: Microsoft Copilot

Tommy Stephens, CPA, CITP, CGMA, K2 Enterprises

Artificial Intelligence (AI) has taken the business world by storm. One of the leading AI platforms for businesses is Microsoft's Copilot offering. Learn how Copilot resembles other AI offerings, like ChatGPT and Gemini, and how it is different. Also, learn how you can incorporate Copilot into everyday tools such as Excel, Word, Outlook and PowerPoint. Further, we will discuss and demonstrate how you can use Copilot to take advantage of "agentic AI" to leverage Copilot to its fullest.

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

YP FRIENDLY

1:55-2:10 p.m. | Break

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

Q1. Smarter Philanthropy: How to Leverage Donor-Advised Funds for Greater Impact

David Bromelkamp, Allodium Investment Consultants

Donor-advised funds (DAFs) are one of the most flexible and underutilized tools in tax-efficient charitable giving. Learn as a donor shares how decades of personal experience with multiple DAFs have shaped his philanthropic strategy — and how CPAs can use similar approaches to benefit clients. Gain practical insights on timing, tax planning, family involvement and how to turn charitable intent into long-term impact.

FOS: Specialized Knowledge - Technical (1.5)

Q2. Key Tax Changes Found in the One Big Beautiful Bill Act (OBBBA)

Edward Zollars, CPA

2025 brought the long-awaited arrival of the bill that extended the expiring provisions in the Tax Cuts and Jobs Act. The OBBBA also contained provisions that the president promised to enact while on the campaign trail, such as the accelerated end to many energy related tax credits. Learn the major items in the bill, including the extension of a number of individual and business tax provisions from the TCJA, the new subtractions for qualified tips, qualified overtime and interest on new car loans, as well as the additional subtraction for those over 65. Also, review some of the energy incentives that expired or expire soon.

FOS: Taxes - Technical (1.5)

YP FRIENDLY

Q3. Protect Your Practice: Cybersecurity Made Simple for CPA Tax Firms

Leah Donti, CPA, MBA, Advantage Montreal Seminars, Inc.

In today's digital age, cybersecurity is no longer optional, especially for small CPA tax firms handling sensitive client data. Learn practical, cost-effective strategies to safeguard your business from cyber threats. Understand how to protect client information, comply with regulations and build trust by implementing key best practices, from password management and secure file sharing to identifying phishing scams and managing system vulnerabilities.

FOS: Information Technology - Technical (1.5)

3:25-3:40 p.m. | Break

3:40-4:30 p.m. | Keynote

R1. What's Your "And"? A People-Centric Approach to Leadership

John Garrett



With his refreshing blend of corporate insight, comedic wit and people-centric advocacy, John Garrett stands at the intersection of professionalism and passion. Prepare to think differently about your organization's culture, and the value of the individual within it. With humor, anecdotes and insights, John challenges traditional notions of professionalism, encouraging attendees to embrace their "Ands" — the outside-of-work passions and hobbies that make them human — and to create a work environment where everyone can thrive.

FOS: Personal Development - Non-Technical (1)

YP FRIENDLY

YOUNG PROFESSIONALS TRACK

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The YP Track is an in-person, cohort-style learning and networking experience designed for young tax professionals. New to 2025, the YP Track has expanded to two levels: Level One for 1-2 years or Level Two for 3-4 years of experience.

| YP TRACK MONDAY, NOV. 17 | | |
|----------------------------|---|---|
| | LEVEL ONE | LEVEL TWO |
| 8-9:05 a.m. | A1. AICPA Profession Opportunities Update (Opening Keynote Speaker) (YP Level One and Two) <i>Lisa Simpson, American Institute of Certified Public Accountants</i> Lisa Simpson, AICPA VP-Firm Services has a front row seat to developments in the accounting and finance profession. Join this fast-paced presentation to hear the latest on what's happening in the profession and what's on the horizon. She'll discuss changes to business models firms should consider in light of a rapidly changing environment. FOS: Specialized Knowledge - Technical (1) | |
| 9:25-10:40 a.m. | B4. Level One: Form 1040 Basics <i>Phyllis Kapetanakis, MBT, Augsburg University</i> Ever wonder how all those tax forms connect to the 1040? Learn this process step by step, tracing source documents to the proper schedules and ultimately to a completed return. Through a practical case study, gain hands-on experience reviewing common tax documents, determining where they belong and seeing how they come together on Form 1040. FOS: Taxes - Technical (1.5) | B5. Level Two: Form 1040 <i>Pat Garverick, CPA, MT, CFP®, The Tax U</i> High-income tax returns come with high-stakes challenges. Dive into the complexities of the Qualified Business Income (QBI) deduction and the 3.8% Net Investment Income Tax (NIIT) to equip yourself with advanced strategies for navigating high-income Form 1040 filings. FOS: Taxes - Technical (1.5) |
| 11a.m.-12:15 p.m. | C4. Level One: Form 1040 Basics (Continued) <i>Phyllis Kapetanakis, MBT, Augsburg University</i> See session B4 for session description. FOS: Taxes - Technical (1.5) | C5. Level Two: Form 1040 (Continued) <i>Pat Garverick, CPA, MT, CFP®, The Tax U</i> Real estate can open the door to both opportunity and complexity in tax planning. Explore the rules surrounding passive activities and the Real Estate Professional (REP) exception, focusing on how to identify material participation and uncover strategies for clients with real estate-heavy portfolios. FOS: Taxes - Technical (1.5) |
| 12:15-1 p.m. | LUNCH BREAK | |
| 1-1:50 p.m. | D3. Ethics Update: Emerging Issues and Key Developments (General Session) (YP Level One and Two) <i>Charles Selcer, CPA, CGMA, MBA, Schechter Dokken Kanter CPAs</i> Gain an essential update on current ethics issues impacting the profession, including private equity ownership of firms, the growing role of executive search services, recent enforcement matters and evolving pathways to licensure. Explore timely insights into the regulatory landscape, professional responsibilities and practical considerations that shape how CPAs serve their clients and firms. FOS: Regulatory Ethics - Technical (1) ETHICS | |
| 2:10-3:25 p.m. | E4. Level One: Form 1040 Basics (Continued) <i>Phyllis Kapetanakis, MBT, Augsburg University</i> See session B4 for session description. FOS: Taxes - Technical (1.5) | E5. Level Two: Form 1040 (Continued) <i>Pat Garverick, CPA, MT, CFP®, The Tax U</i> See session C5 for session description. FOS: Taxes - Technical (1.5) |
| 3:45-5 p.m. | F4. Level One: Minnesota Individual Income Tax: Form M1 and Other Schedules <i>Dana Duberry, Eide Bailly LLP</i> <i>Kelsey Newman, CPA, Eide Bailly LLP</i> Navigating Minnesota's individual income tax doesn't have to be intimidating. Learn how to prepare Form M1 from start to finish. Understand who needs to file, what information is required, how to complete key sections and common schedules and how to calculate refunds or amounts owed. Leave with the knowledge and confidence to file a basic Minnesota return and know where to find support when needed. FOS: Taxes - Technical (1.5) | F5. Level Two: Tax Research: Intermediate Concepts <i>David Peters, CPA, CGMA, CPCU, ChFC, CLU, CFP®, Peters Professional Education</i> Providing accurate, timely answers to clients' tax questions is a core challenge for practitioners. Dive into plain-language explanations and practical examples to help you perform tax research more efficiently, covering the structure of primary sources, the differences between primary and secondary sources and each step of the research process. FOS: Taxes - Technical (1.5) |
| | Happy Hour (Registration suggested) Sponsored by AMBA, OneNet Global and Ryan, LLC | |

YP TRACK | TUESDAY, NOV. 18

| LEVEL ONE | | LEVEL TWO |
|-----------------------|--|--|
| 8-9 a.m. | G4. The Tax Lifecycle of a Business (YP Level One and Two) <i>Christopher Martin, JD, Eide Bailly LLP and Kelsey Newman, CPA, Eide Bailly LLP</i> Choosing the right business structure can make or break your client's bottom line — and their tax bill. Explore how business structures affect tax obligations and weigh the pros and cons of each entity type. Learn to identify key deductions, credits and sales tax requirements, while gaining insight into how tax software and AI are shaping modern practice. Gain practical knowledge to support business formation, operations and long-term planning. FOS: Taxes - Technical (1) | |
| 9:20-10:35 a.m. | H4. Level One: Depreciation Demystified: A Fresh Start for Tax Newbies <i>Rebecca Johnson, CPA, Christianson PLLP</i> New to tax? Unlock the mystery of depreciation and see how it impacts real-world planning. This course breaks down MACRS, bonus depreciation and Section 179 into practical concepts. Through hands-on examples and straightforward explanations, learn how depreciation works as a strategic planning tool. Walk away with tools to tackle depreciation in any client scenario. FOS: Taxes - Technical (1.5) | H5. Level Two: Partnership Capital Accounts and Basis <i>Todd Laney, Eide Bailly LLP</i> Take an in-depth look at key partnership taxation concepts essential to CPAs. Explore the differences and interactions between inside basis, outside basis, tax basis capital and §704(b) capital and how §704(c) allocations work in practice. Learn how partnership liabilities impact each type of capital and basis and walk away with practical insight to handle complex transactions and guide clients with confidence. FOS: Taxes - Technical (1.5) |
| 10:55 a.m.-12:10 p.m. | I3. Excel Update 2025 (General Session) (YP Level One and Two) <i>Tommy Stephens, CPA, CITP, CGMA, K2 Enterprises</i> Excel remains the business professional's tool of choice for many situations, yet most of these same professionals remain unaware of key new features that can increase accuracy and improve productivity. Learn critical new features that have been added to Excel to help you work more efficiently and effectively. Dive into Excel's PIVOTBY and GROUPBY functions, enhanced integration with Copilot, Sheet Views, in-cell Checkboxes and Focus cells. Also, explore several PivotTable features that most users remain unaware of and how you can put them to use. FOS: Computer Software & Applications - Non-Technical (1.5) | |
| 12:10-1 p.m. | LUNCH BREAK | |
| 1-3:50 p.m. | J4-K4. Level One: Form 1120-S <i>George Koutelieris, CPA, MS-Tax, Johnson & Shute, PS</i> <i>Greg White, WGN, PS</i> S corporations are a favorite for business owners, but the tax rules can be tricky to master. Navigate the ins and outs of S corporation taxation, the most popular choice of tax entity. Gain experience with Form 1120-S and key schedules, including Schedule 1125-E. Learn how to determine reasonable compensation for shareholders, report shareholder loans correctly and spot common mistakes that can terminate S corporation status. FOS: Taxes - Technical (3) | J5-K5. Level Two: Form 1065 <i>Pat Garverick, CPA, MT, CFP®, The Tax U</i> Forming a partnership correctly from the start can save headaches — and taxes — down the road. Build a strong foundation in partnership formation by learning how to determine the inside tax basis of assets, track tax vs. book capital accounts, establish partners' initial outside basis and capital, and address §704(c) pre-contribution gains. Develop the know-how to allocate gains accurately, report them properly on Schedule K-1 and ensure partnerships start off right. FOS: Taxes - Technical (3) |
| 4:10-5 p.m. | L4. The Subtle Art of Standing Out (YP Level One and Two) <i>Linda Wedul, CAE, Minnesota Society of CPAs</i> Standing out opens doors to greater success. Discover how subtle choices in how you show up, listen and communicate can differentiate you, especially early in your accounting career. Examine how your presence and communication style build trust and shape a reputation that earns respect. Leave with practical strategies to boost your confidence, credibility and strengthen connections with colleagues and clients from day one. FOS: Personal Development - Non-Technical (1) | |

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GENERAL INFORMATION

DATE Nov. 17-19, 2025
TIME 8 a.m.-5 p.m. Central
FORMAT In-person, hybrid or virtual
CODE 25CF-TAXC
CREDITS 24 CPE | 3.5 Ethics*
20 CFP®, 15 IRS CE* and CLE application pending
**Session dependent — see schedule*
VENUE Minneapolis Convention Center
1301 2nd Ave S, Minneapolis, MN 55403

ATTENDANCE OPTIONS

REGISTRATION TYPES

Hybrid — All Days

Nov. 17-18: In-person at Minneapolis Convention Center
Nov. 19: Virtual

Virtual — All Days

Nov. 17-19: Online

In-Person — 1st & 2nd Days Only

Nov. 17-18: In-person at Minneapolis Convention Center

MAIN CONFERENCE PRICING (YOUNG PROFESSIONALS TRACK PRICING ON PAGE 13.)

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