



# TAX23

What's brewing?

## MNCPA TAX CONFERENCE

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

# PROGRAM

## TABLE OF CONTENTS

Welcome.....	2	Conference Schedules.....	17-21
Partners and Sponsors.....	3	SharePoint Credit Union — MNCPA partner.....	18
Attending Virtually.....	3	Transworld Business Advisors.....	20
Maps & WiFi Access.....	4	MNCPA Membership.....	22
Accsurant — Session sponsor.....	5	Games and Goodies.....	23
CPE Information.....	6	Wagner Tax Law — Session sponsor.....	24
AMBA — MNCPA partner.....	7	MNCPA Tax CPE.....	25
Sponsor & Exhibitor Directory.....	8-14	2024 MNCPA Conference Calendar.....	25
Capstan Tax Strategies — Session sponsor.....	9	CPA Licensure Legislation.....	26
Dell Technologies — MNCPA partner.....	11	Help Plan Tax24.....	27
MS Consultants LLC — Session sponsor.....	13	Stearns Bank.....	27
VC3 — Session sponsor.....	15	Wesely & Wesely CPAs.....	27
Practice Panda.....	16	West Bend Mutual Insurance.....	28

## THANK YOU TAX23 PARTNERS AND SPONSORS

### MNCPA PARTNERS



### SPONSORS



# WELCOME

## PLANNING TASK FORCE

Thank you to the planning task force members who contributed their expertise and time to the development of the MNCPA Tax Conference (TAX23). Their dedication to this event's success is greatly appreciated by MNCPA members and staff. *\*Indicates TAX23 Young Professionals Track subcommittee members.*

### CHAIR

**Tammy Hutter\***  
Eide Bailly LLP

### MEMBERS

**Dennis Anding**  
Crowe LLP

**Nikki Bocock**  
DraftCo & Associates

**Keith Cooreman**  
Christianson PLLP

**Michael Crabtree**  
Boulay

**Scott Curtis**  
U.S. Bancorp

**Andrew Gillund**  
Berger Financial Group, Inc.

**Phyllis Kapetanakis\***  
Augsburg University

**Keegan Leonard\***  
Malloy, Montague, Karnowski, Radosevich & Co., P.A.

**Carl Peterson**  
American Institute of Certified Public Accountants

**Claudia Revermann**  
Revermann Law

**Andrea Schulz**  
Deloitte Tax LLP

**David Stenseth**  
Stenseth, Samuelson & Boese, Ltd.

**Brad Wallace**  
VonLehman CPA & Advisory

**Wayne Alan Williams**  
Accredited Investors Wealth Management

## MNCPA CONFERENCE MANAGEMENT

**Lynn Kletscher**  
Director of Education

**Deb Griffith**  
Conference Coordinator

**Betsy Narr**  
Conference Coordinator

**Leslie Mueller**  
Strategic Partnership Specialist

**Krissy Schoenfelder-Carlson**  
CPE Marketing Coordinator

## TAX CONNOISSEURS,

Welcome to TAX23. Whether you're attending the hybrid option or tuning in virtually, the MNCPA and the conference planning task force are happy you're here.

As we all know, when it comes to taxes, something new is always brewing. It's a continual process of filtering through issues in client meetings, pouring over the implications of new legislation and sprinkling in some changing economic conditions. Then, mix it all together for the perfect blend.

TAX23 will help you do all of that.

### Order up the insights you need.

- Craft your own schedule to get the CPE, ethics and specialty credits you need.
- Ask questions. Speakers will answer questions as time allows at each session.
- Download the conference materials — they're available in your MNCPA CPE account during the conference and for the following two weeks.

### Connect and have fun!

- Mingle with peers, your professional association and event sponsors and partners.
- Connect with new and old friends at lunch and happy hour or in the app.
- Check out the exhibitor booths, participate in the games — and maybe even win some prizes.

I'd like to personally welcome the participants of the TAX23 Young Professionals Track. You are in for lots of learning and fun along the way. To our more seasoned attendees, if you spot these young professionals, please introduce yourself and welcome them to the conference.

Thanks for joining us for TAX23. Enjoy the conference!



Tammy Hutter, CPA  
TAX23 Planning Task Force Chair

## WELCOME YOUNG PROFESSIONALS

Welcome to the MNCPA TAX23 Young Professionals Track. The MNCPA and Tax Conference task force hope you learn a lot, make lasting connections and have a great time!

### Session rooms:

- The majority of the YP track sessions will be in room M101B, on the mezzanine level.
- Refer to the general conference agenda for general session room assignments.
- YP track session D4, which includes lunch, is in the Seasons reception area on level two.

### Continuing education credits:

YP track credits differ from the general conference. For details, please visit [www.mncpa.org/TaxConference/YP](http://www.mncpa.org/TaxConference/YP).

### Make the most of your conference experience:

- Connect with peers.
- Connect with seasoned tax pros in the general sessions, breaks, lunch and happy hour.
- Visit the exhibitors for resources and ideas.
- Visit the MNCPA booth to learn more about our work, advocacy and how we support the CPA profession.

# THANK YOU PARTNERS, SPONSORS & EXHIBITORS

## MNCPA PARTNERS



## SPONSORS



## THANK YOU FOR SUPPORTING THE MNCPA

The right product or service can help you work smarter and add more value to your organization. Please take a moment to find the tools your company needs by visiting the booths and websites of our MNCPA partners, sponsors and exhibitors. These companies are strong supporters of the MNCPA. Let's support them, too! See pages 10, 12 and 14 for more details.

# ATTENDING TAX23 VIRTUALLY

Detailed instructions and access links are sent via email, so please watch your inbox.

In short, here's what to know about attending virtually, whether you're participating that way for the full conference or just on Wednesday, Nov. 15.

### RECOMMENDED:

#### Access via your computer:

- Click the "Access Event on Desktop" link at the bottom of the reminder email.
- To join sessions, follow the steps listed to the right.

#### Access via your mobile device:

- Download the Eventsential app to your mobile device.
- Click the "Get Started Now" button at the bottom of the reminder emails.

OR

- In the Eventsential app, search for "Minnesota Society of CPAs."
- Select the TAX23 event.
- Enter your email address.
- Select "Send Link."
- Using your mobile device, click the link sent to you via email.

#### To join sessions:

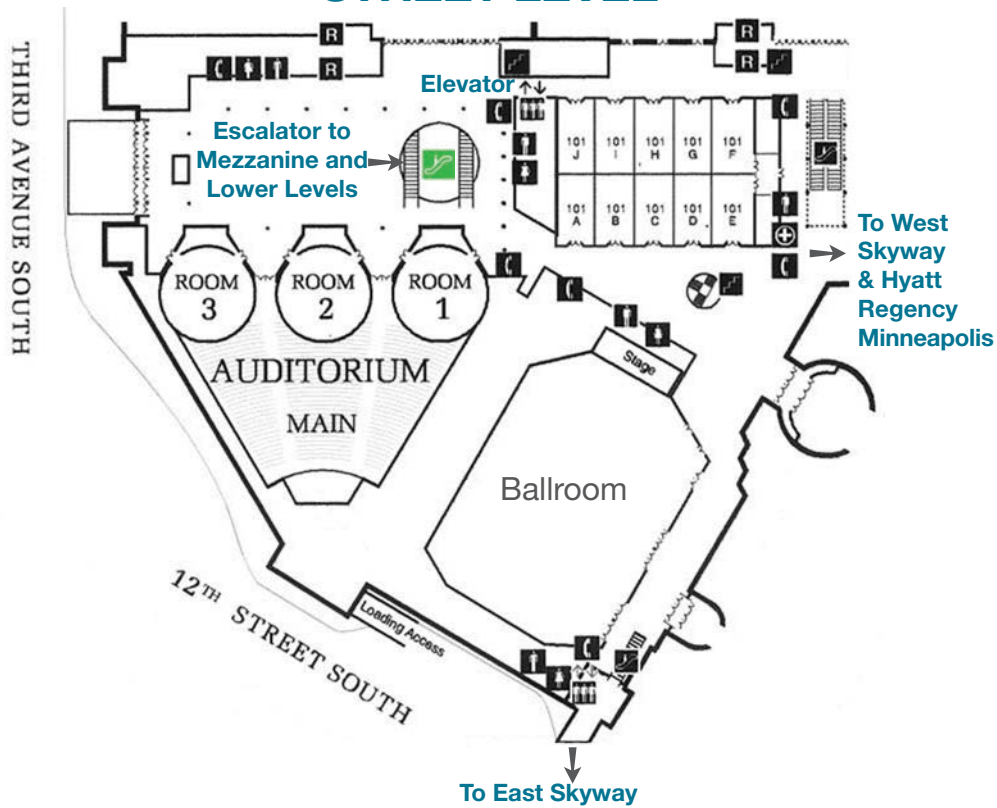
- Click the "Schedule" menu option within the event platform.
- Click the title of the session you'd like to join.
- Click the "Join Session" button.
- Follow the prompts to access session.

Materials are available on the MNCPA website (via your CPE account) and within the conference platform.

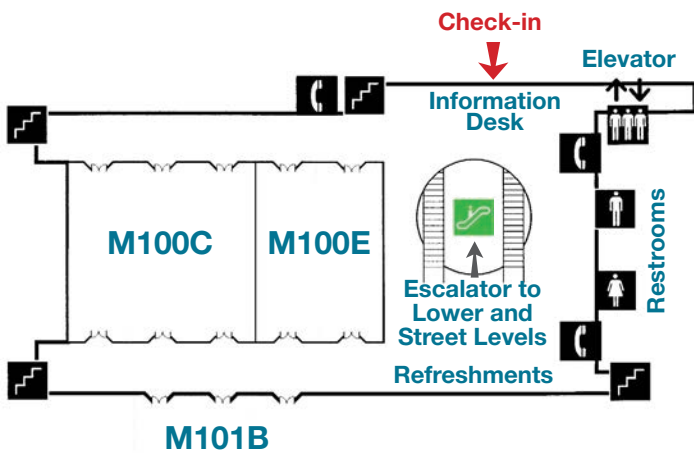
**Questions?** Call us the MNCPA at 952-831-2707.

# CONFERENCE MAPS

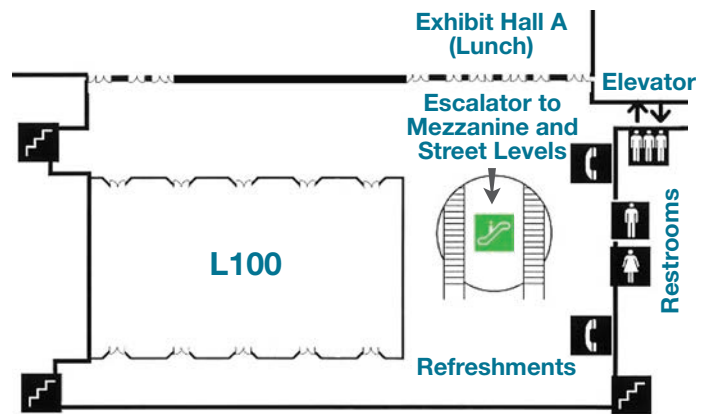
## STREET LEVEL



## MEZZANINE LEVEL



## LOWER LEVEL



## WI-FI ACCESS

For attendees on site at the Minneapolis Convention Center, there is complimentary Wi-Fi.

Network (not case sensitive): **MNCPA**

Password (case sensitive): **taxconf23**

Stop by the information desk if you're experiencing difficulties.



We offer reliable, skilled, dedicated, cross-trained agile teams who will contribute to your business growth while leveraging the in-house technology expertise, allowing you to maintain competitive profit margins.



## FINANCE & ACCOUNTING

- Bookkeeping
- Payroll
- Revenue Recognition
- Fixed Assets Management
- Cost Management
- Financial Reporting
- Regulatory Reporting
- Financial Dashboards



## AUDIT & ADVISORY

- Financial Statement Audits
- Compliance Audits
- Due Diligence Support
- Financial Planning & Analysis
- Budgeting & Forecasting



## TAX SERVICES

- Individual
- Business
- Partnership
- Nonprofit
- Payroll & State
- Tax Registration

# CONTINUING EDUCATION

## CONTINUING EDUCATION CREDITS

The MNCPA Tax Conference (TAX23) is approved for the following continuing education credits. Total hours are based on attendance at all three days of the conference unless otherwise noted.

**TAX23 Young Professionals Track credits differ.** For details, please visit [www.mncpa.org/TaxConference/YP](http://www.mncpa.org/TaxConference/YP).

**CPE:** 24 hours

See agendas on pages 17-21 for technical / non-technical fields of study.

**Ethics:** 4 hours available

To receive ethics credits, you must be registered for and attend approved sessions: E1 (1.5 hours), H3 (1 hour), P2 (1.5 hours).

**IRS CE:** 13 hours available

See agendas on pages 17-21 or visit

[www.mncpa.org/TaxConference/credits](http://www.mncpa.org/TaxConference/credits) to see approved sessions.

**CLE (Standard):** 19.5 hours available

**CFP®:** 22 hours available

See agendas on pages 17-21 or visit

[www.mncpa.org/TaxConference/credits](http://www.mncpa.org/TaxConference/credits) to see approved sessions.

*Certified Financial Planner Board of Standards Center for Financial Planning, Inc. (CFP Board Center) owns and licenses to Certified Financial Planner Board of Standards, Inc. the CFP® certification mark, the CERTIFIED FINANCIAL PLANNER™ certification mark, the CFP® (with plaque design) certification mark and the CFP® (with flame design) certification mark in the United States, which CFP Board authorizes use of by individuals who successfully complete CFP Board's initial and ongoing certification requirements. CFP Board Center also owns and licenses to CFP Board the CFP BOARD® service mark. Any marks owned by CFP Board Center and licensed to CFP Board are used with permission.*

## ATTENDANCE VERIFICATION

CPE Credit:

- **In-person sessions:** To receive full credit, you must be registered for sessions, attend the sessions you are registered for and check into each session using the QR code scanner in the Eventsential conference app.
- **Livestream and virtual sessions:** To receive full credit, you must be registered for sessions, attend the sessions you are registered for and answer all attendance checks.
- **Session registration is required** to ensure continuing education credits are awarded correctly. You may select or update your sessions through the last day of the conference. See details to the right for instructions on how to change session registrations.

CLE Credit:

- Same as CPE. You are responsible for reporting your credits to the CLE Board.

## TO RECEIVE IRS CE AND/OR CFP CREDITS, YOU MUST:

- Follow above instructions for receiving CPE and CLE credits.
- **IRS CE:** Sign in with your IRS PTIN within the conference platform. Click the “Credits” navigation icon, select “IRS CE Sign-in” and follow the prompts.

- **CFP:** Sign in with your CFP ID number within the conference platform. Click the “Credits” navigation icon, select “CFP Sign-in” and follow the prompts.

## SELECTING OR CHANGING SESSIONS

You can add or modify your session registrations through the last day of the conference, Nov. 15. Visit [www.mncpa.org/mycpe](http://www.mncpa.org/mycpe) and select “View my schedule.”

1. Log in with your username and password.
2. Click on the “Sessions” link listed under the Tax Conference event.
3. Click the “Add/Remove Sessions” button (above the “List of Your Sessions” heading).
4. Use the check boxes to make your session selections.
5. Click “Continue” at the bottom of the page.

You can also call the MNCPA at 952-831-2707 to change your session selections.

## CONFERENCE MATERIALS

Most sessions have materials available for download. You can access the PDFs via the MNCPA website through Wednesday, Dec. 6, or via the conference app during the conference. Your registration must be paid in full to access the materials on the MNCPA website.

To access materials from the MNCPA website:

1. Go to [www.mncpa.org/materials](http://www.mncpa.org/materials).
2. Log in using your MNCPA username and password.
3. Select the event for the materials you want to access.
4. Click file name(s) to download.

To access materials from within the conference app:

1. Select session on schedule.
2. Scroll down to “Resources” section.
3. Click file name to open/download.

Or within the virtual session room:

1. Select “Handouts” from the right-hand menu.
2. Click to view or download PDF.

## CERTIFICATE OF ATTENDANCE (CPE TRANSCRIPT)

Your CPE transcript will be updated with TAX23 credit information and available several weeks after the conference at [www.mncpa.org/transcript](http://www.mncpa.org/transcript).

## GETTING HELP FROM THE MNCPA

If you're attending in person on Monday and Tuesday, stop by the information desk and talk to an MNCPA staff member. For virtual event help, find information about sessions, speakers, credits and more in the Eventsential conference platform or give us a call at 952-831-2707.

Sponsored by:



MNCPA GROUP  
INSURANCE PROGRAM

# PROTECT WHAT YOU CAN INSURE WHAT YOU CAN'T

At whatever stage of life you're in, or how well you have planned, events can happen that are simply beyond your control.

That is why as an MNCPA member, you have access to high-quality insurance plans designed to help provide peace-of-mind protection against the unexpected.



**Ask About  
Securing a  
Proposal—  
Made Easy!**

**LEARN MORE TODAY!**

## PRODUCTS DESIGNED FOR MNCPA MEMBERS:

- Group 10- or 20-Year Level Term Life Insurance
- Group Accidental Death and Dismemberment Insurance
- Group Disability Income Insurance
- Long-Term Care Insurance
- Annual Renewable Group Term Life Insurance
- Senior Group Term Life Insurance
- Accountants Professional Liability Insurance
- Cyber Privacy Liability Insurance
- Auto/Home Insurance
- Travel Assistance—AssistPlus



*Portable coverage that's never tied to any firm or employee benefit program*

Plans may vary and may not be available in all states.

Visit [mncpa-insurance.com](https://mncpa-insurance.com) or call 1-800-732-8350 for coverage features, costs, eligibility, reduction of benefits, renewability, portability, limitations and exclusions.

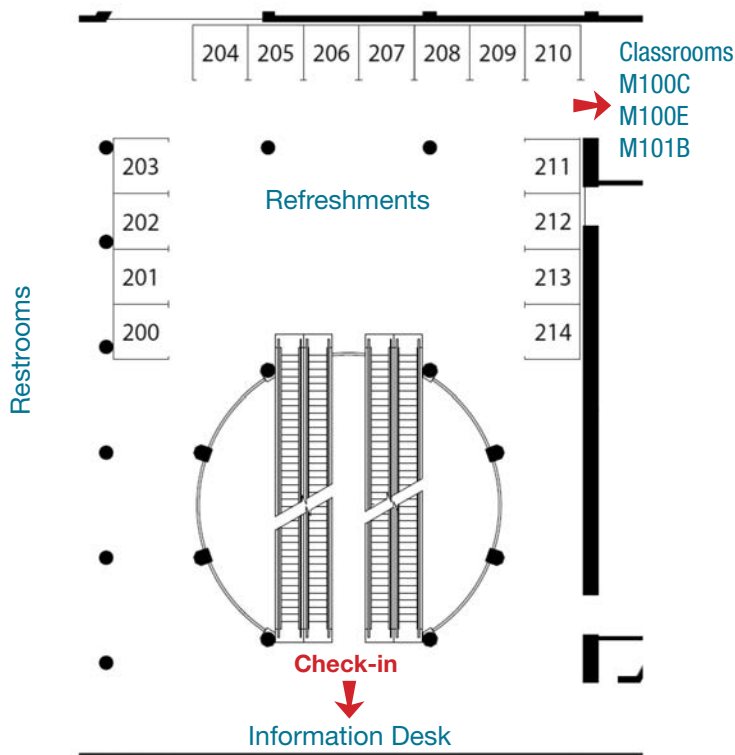


Association Member Benefits Advisors, LLC.

In CA d/b/a Association Member Benefits & Insurance Agency  
CA Insurance License #0196562  
AR Insurance License #100114462

# SPONSOR & EXHIBITOR DIRECTORY

## MEZZANINE LEVEL

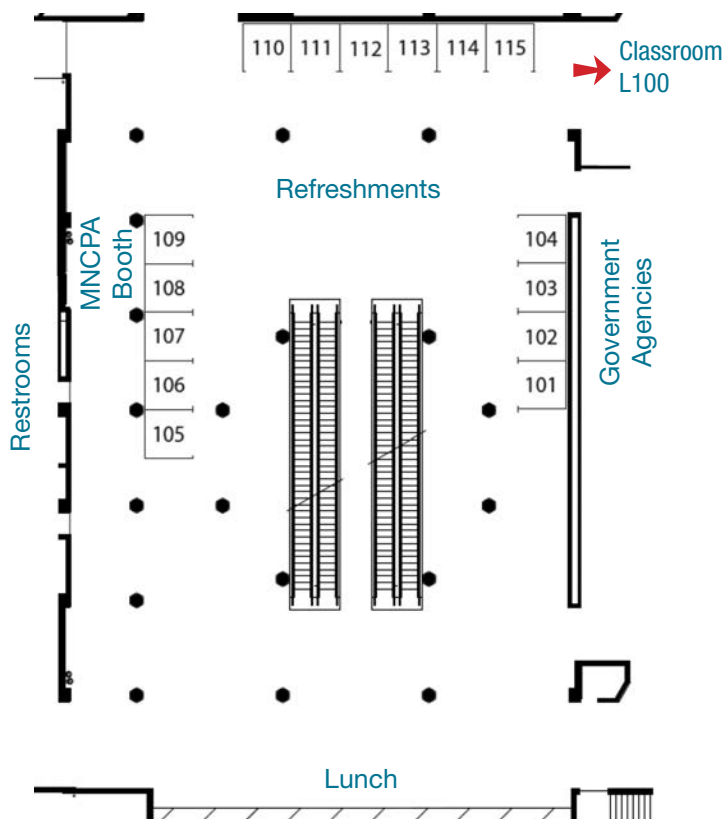


## COMPANY

## BOOTH

Accurant — <i>New this year!</i>   <i>Session sponsor</i> .....	Not exhibiting
AMBA — <i>MNCPA partner</i> .....	110
Bethel University .....	214
Bridge West Consulting — <i>New this year!</i> .....	106
Capstan Tax Strategies — <i>New this year!</i>   <i>Session sponsor</i> ...	204
Choice Bank .....	202
CRSP Connect LLC — <i>New this year!</i> .....	112
Dell Technologies — <i>MNCPA partner</i> .....	Virtual only
Drake Software .....	205
Edward Jones — <i>New this year!</i> .....	208
Huntington Bank — <i>New this year!</i> .....	113
Internal Revenue Service — <i>New this year!</i> .....	101
Miles Education — <i>New this year!</i> .....	115
MN Department of Revenue .....	104
Minnesota Society of CPAs .....	108-109
MN Department of Employment and Economic Development - Unemployment Insurance .....	103
MN Department of Natural Resources - Nongame Wildlife Program .....	102
MS Consultants LLC — <i>Session sponsor</i> .....	211
Saint Paul & Minnesota Foundation .....	200
SharePoint Credit Union — <i>MNCPA partner</i> .....	107
Sit Mutual Funds .....	206
Stearns Bank — <i>New this year!</i> .....	210
Transworld Business Advisors — <i>New this year!</i> .....	114
VC3 — <i>New this year!</i>   <i>Session sponsor</i> .....	212
Versique Search & Consulting — <i>New this year!</i> .....	207
Wagner Tax Law — <i>Session sponsor</i> .....	213
Wesely & Wesely CPAs — <i>New this year!</i> .....	111
West Bend Mutual Insurance .....	201
Wolters Kluwer Tax & Accounting .....	203

## LOWER LEVEL







# Nationwide Reach, But at Home in Minnesota

Cost Segregation | R&D Tax Credits | Energy

Feel confident about expanding your service offerings.  
Practical, reliable, trustworthy – you can count on Capstan  
to treat your clients right.

Learn More | [Capstantax.com](https://www.capstantax.com)



**CAPSTAN**  
our strength. your tax savings.

# SPONSOR & EXHIBITOR DIRECTORY

## Accurant

*New this year!*

*Session sponsor*

**Booth:** Not exhibiting

**Contact:** John McKenna

**Address:** 12 Roosevelt Dr., Mystic, CT 06355

**Email:** john.mckenna@mresult.com

**Phone:** 203-829-4288

**Website:** accurant.com

**Products:** Remote accounting worker and FP&A tool

## AMBA

*MNCPA partner*

**Booth:** 110

**Contact:** Eric Sash

**Address:** 4050 NW 114th St., Urbandale, IA 50322

**Email:** eric.sash@amba.info

**Phone:** 800-503-9230

**Website:** mncpa-insurance.com

**Products:** MNCPA member insurance benefits like Accountants Professional Liability Insurance, Cyber Liability Insurance and much more

**Door prize:** \$50 Amazon gift card

## Bethel University

**Booth:** 214

**Contact:** Lucas Hyllberg

**Address:** 3900 Bethel Dr., St. Paul, MN 55112

**Email:** l-hyllberg@bethel.edu

**Phone:** 651-638-6400

**Website:** bethel.edu/graduate/academics/mba/jumpstart/professional-pathway

**Products:** Graduate programs in business and leadership

**Door prize:** Bethel logoed blanket

## Bridge West Consulting

*New this year!*

**Booth:** 106

**Contact:** Peter Prevot

**Address:** 7900 International Dr., Ste. 800, Bloomington, MN 55425

**Email:** peter@bridgewestconsulting.com

**Phone:** 303-651-0304

**Website:** bridgewestconsulting.com

**Products:** Cannabis resources for CPAs

**Door prize:** \$100 Amazon gift card and free consultation (two separate door prizes)

## Capstan Tax Strategies

*New this year!*

*Session sponsor*

**Booth:** 204

**Contact:** Todd French

**Address:** 200 Dryden Rd., Ste. 3400, Dresher, PA 19025

**Email:** tfrench@capstantax.com

**Phone:** 215-775-8510

**Website:** capstantax.com

**Products:** R&D tax credit studies, cost segregation studies

**Door prize:** \$100 Amazon gift card

## Choice Bank

**Booth:** 202

**Contact:** Dion Muchow

**Address:** 2640 Eagan Woods Dr., Eagan, MN 55121

**Email:** d.muchow@bankwithchoice.com

**Phone:** 651-289-2222

**Website:** bankwithchoice.com

**Products:** Business banking services for financial professionals

## CRSP Connect LLC

*New this year!*

**Booth:** 112

**Contact:** Ronak Agrawal

**Address:** 146 W. 29th St., Ste. 10W, New York, NY 10001

**Email:** ronak@crspconnect.com

**Phone:** 631-672-5934

**Website:** crspconnect.com

**Products:** Offshore staffing and outsourcing

## Dell Technologies

*MNCPA Partner*

**Booth:** Virtual

**Contact:** Amy Henry

**Address:** 1 Dell Way, Round Rock, TX 78682

**Email:** amy.henry@dell.com

**Phone:** 512-513-0037

**Website:** dell.com/mncpa.org

**Products:** Technology discounts for MNCPA members

## Drake Software

**Booth:** 205

**Address:** 235 East Palmer St., Franklin, NC 28734

**Email:** sales@drakesoftware.com

**Phone:** 800-890-9500

**Website:** drakesoftware.com

**Products:** Tax preparation software

**Door prize:** \$200 Visa gift card

## Edward Jones

*New this year!*

**Booth:** 208

**Contact:** Sean McCullough, CFP® CRPS

**Address:** 15800 32nd Ave. N., Plymouth, MN 55447

**Email:** sean.mccullough@edwardjones.com

**Phone:** 612-216-5559

**Website:** edwardjones.com/us-en/financial-advisor/sean-mccullough

**Products:** ERISA plan fiduciary services, education, plan monitoring, financial planning

## Huntington Bank

*New this year!*

**Booth:** 113

**Contact:** Gene Richtsmeier

**Address:** 11100 Wayzata Blvd., Minnetonka, MN 55305

**Email:** gene.richtsmeier@huntington.com

**Phone:** 763-232-1217

**Website:** huntington.com

**Products:** Acts, treasury, SBA financing, equipment finance

**Door prize:** (2) \$100 Target gift cards



 **mncpa**  
Elevate your impact.

## DELL Technologies

Members receive exclusive benefits. Access your additional **5-10%** savings by visiting [www.Dell.com/MNCPA](http://www.Dell.com/MNCPA) or call 855-900-5548 to speak with a Small Business Advisor. Contact MNCPA's Account Executive, Amy, at [Amy\\_Henry@dell.com](mailto:Amy_Henry@dell.com) with any questions.



# SPONSOR & EXHIBITOR DIRECTORY

## Internal Revenue Service

*New this year!*

**Booth:** 101

**Contact:** Alan Gregerson

**Address:** 1550 American Blvd. E., Ste. 805,  
Bloomington, MN 55425

**Email:** alan.j.gregerson@irs.gov

**Phone:** 763-347-7352

**Website:** irs.gov

**Products:** IRS resources for CPAs

## Miles Education

*New this year!*

**Booth:** 115

**Contact:** Cora Vollmar

**Address:** 1013 Centre Rd. Ste. 403S, Wilmington, DE 19805

**Email:** cora.vollmar@mileseducation.com

**Phone:** 586-246-3598

**Website:** mileseducation.com

**Products:** Onshore CPA staffing solutions

## MN Department of Revenue

**Booth:** 104

**Contact:** Mark Krause

**Address:** 600 N. Robert St., St. Paul, MN 55101

**Email:** mark.krause@state.mn.us

**Phone:** 651-556-6622

**Website:** revenue.state.mn.us

**Products:** DOR resources to CPAs

## Minnesota Society of CPAs

**Booth:** 108-109

**Contact:** Amy Johnston

**Address:** 1650 W. 82nd St., Ste. 600, Bloomington, MN 55431

**Email:** membership@mncpa.org

**Phone:** 952-831-2707

**Website:** mncpa.org

**Products:** MNCPA member benefits

## MN Department of Employment and Economic Development - Unemployment Insurance

**Booth:** 103

**Contact:** Aaron Tell

**Address:** 332 Minnesota St., St. Paul, MN 55101

**Email:** aaron.tell@state.mn.us

**Phone:** 651-259-7567

**Website:** uimn.org

**Products:** Unemployment insurance information

## MN Department of Natural Resources - Nongame Wildlife Program

**Booth:** 102

**Contact:** Lori Naumann

**Address:** 500 Lafayette Rd., St. Paul, MN 55155

**Email:** lori.naumann@state.mn.us

**Phone:** 651-259-5148

**Website:** mndnr.gov/nongame/donate

**Products:** Nongame wildlife checkoff on Minnesota tax forms.

**Door prize:** DNR book

## MS Consultants LLC

*Session sponsor*

**Booth:** 211

**Contact:** Ashley Sullivan

**Address:** 100 Corporate Pkwy., Ste. 200, Buffalo, NY 14426

**Email:** asullivan@costsegs.com

**Phone:** 757-448-3988

**Website:** costsegs.com

**Products:** Cost segregation and energy-efficiency studies

**Door prize:** Yeti Roadie cooler

## Saint Paul & Minnesota Foundation

**Booth:** 200

**Contact:** Mariah Brook

**Address:** 101 Fifth St. E., Ste. 2400, St. Paul, MN 55101

**Email:** philanthropy@spmcf.org

**Phone:** 651-224-5463

**Website:** spmcf.org

**Products:** Philanthropic services

**Door prize:** \$100 e-gift card Khaluna restaurant

## SharePoint Credit Union

*MNCPA partner*

**Booth:** 107

**Contact:** Alison Westberg

**Address:** 5300 Hyland Greens Dr., Bloomington, MN 55437

**Email:** alison.westberg@sharepointcu.com

**Phone:** 952-930-0700

**Website:** sharepointcu.com/mncpa

**Products:** Credit union membership for MNCPA members

**Door prize:** Pickleball Set

## Sit Mutual Funds

**Booth:** 206

**Contact:** Steve Benjamin

**Address:** 80 S. 8th St., Ste. 3300, Minneapolis, MN 55402

**Email:** spb@sitinvest.com

**Phone:** 612-359-2554

**Website:** sitfunds.com

**Products:** No-load mutual funds

**Door prize:** \$50 Amazon gift card

## Stearns Bank

*New this year!*

**Booth:** 210

**Contact:** Haley Thell and Shelby Bowland

**Address:** 4140 Thielman Ln., Ste. 105, St. Cloud, MN 56301

**Email:** marketing@stearnsbank.com

**Phone:** 320-253-6607

**Website:** stearnsbank.com

**Products:** Finance, deposit and SBA loans

**Door prize:** Logoed item gift basket



# CPAs Trust Us

## Real Estate Owners Thank Us

Leverage 250 years of combined expertise from our CPAs and engineers; MS Consultants has been the top leader in cost segregation for over 25 years.

### What We Do

- ▶ Cost Segregation Studies
- ▶ Tangible Property Regulations Review
- ▶ Energy Efficiency Analysis (§179D & §45L)
- ▶ Qualified Improvement Property Analysis
- ▶ §1031 Exchange Tax Planning
- ▶ De Minimis Studies

### Watch Our Session Presentation

“SEC. 1031 Under the Final Regulations: Opportunities and Potholes”

Start a Conversation with Us



**Ashley F. Sullivan**  
Director  
asullivan@costsegs.com  
757.705.6264



**Roger D. Upton**  
Director  
rpton@costsegs.com  
585.249.2706

Help Your Clients Reduce Taxes & Free Up Capital

• [COSTSEGS.COM](http://COSTSEGS.COM) •

# SPONSOR & EXHIBITOR DIRECTORY

## Transworld Business Advisors

*New this year!*

**Booth:** 114

**Contact:** Keith Becker and Marv Soldner

**Address:** 3800 American Blvd. W., Ste. 760, Bloomington, MN 55431

**Email:** kbecker@tworld.com and msoldner@tworld.com

**Phone:** 888-290-5232

**Website:** msoldner@tworld.com

**Products:** We sell businesses

**Door prize:** Bose QuietComfort noise-canceling headphones

## VC3

*New this year!*

*Session sponsor*

**Booth:** 212

**Contact:** Christina Zarndt

**Address:** 5614 Grand Ave., Duluth, MN 55807

**Email:** christina.zarndt@vc3.com

**Phone:** 612-417-1008

**Website:** vc3.com

**Products:** Managed IT and cybersecurity services

## Versique Search & Consulting

*New this year!*

**Booth:** 207

**Contact:** Paige Batcha, CPA

**Address:** 6465 Wayzata Blvd., Ste. 800, Minneapolis, MN 55426

**Email:** pbatcha@versique.com

**Phone:** 952-935-2000

**Website:** versique.com

**Products:** Finance, accounting and human resources consulting and direct hire

## Wagner Tax Law

*Session sponsor*

**Booth:** 213

**Contact:** Ben Wagner

**Address:** 7900 W. 78th St., Ste. 350, Edina, MN 55439

**Email:** ben@wagnertaxlaw.com

**Phone:** 952-921-2101

**Website:** wagnertaxlaw.com

**Products:** Provides a collaborative approach to managing your tax controversies.

**Door prize:** Yeti Roadie cooler

## Wesely & Wesely CPAs

*New this year!*

**Booth:** 111

**Contact:** Kyle Wesely

**Address:** 10201 Wayzata Blvd., Ste. 330, Minnetonka, MN 55305

**Email:** kyle@weselycpas.com

**Phone:** 952-525-9630

**Website:** weselycpas.com

**Products:** Specialists in charitable remainder trusts

**Door prize:** \$100 gift card to Trevail restaurant

## West Bend Mutual Insurance

**Booth:** 201

**Contact:** Scott Stueber

**Address:** 1900 South 18th Ave., West Bend, WI 53095

**Email:** sstueber@wbmi.com

**Phone:** 262-334-6588

**Website:** thesilverlining.com

**Products:** Discount on home and auto insurance for MNCPA members

**Door prize:** Portable car jump starter kit

## Wolters Kluwer Tax & Accounting

**Booth:** 203

**Contact:** Tammy Nickels

**Address:** 225 Chastain Meadows C., Ste. 200, Kennesaw, GA 30144

**Email:** tammy.nickels@wolterskluwer.com

**Phone:** 214-622-4768

**Website:** taxna.wolterskluwer.com

**Products:** Tax, audit, firm management, and tax research solutions

**Door prize:** \$200 eGift card

## FINANCIAL SERVICES IT SUPPORT

# Looking for cybersecurity, compliance, and IT support from a provider that understands financial services?

Get the support you need to clarify and manage enterprise risk while maintaining financial regulatory compliance. When you work with us, you get a proactive partner who understands the critical concerns of financial services organizations.

- ▶ **RISK MANAGEMENT EXPERTISE:** Our team's enterprise risk management knowledge enables your organization with the technology and policies to mitigate risk and remain compliant.
- ▶ **DEEP RELATIONSHIPS WITH THE FINANCIAL SERVICES INDUSTRY** We sit on the boards of several credit unions and banks while also partnering with many financial services associations.
- ▶ **FAST RESOLUTION TIME:** We understand that downtime is unacceptable and technology should not be a barrier when doing business. Our average minutes to resolution is 45 minutes, which minimizes disruption.



### MANAGE

Drastically reduce the time employees waste getting IT to work.



### PROTECT

Remain secure and compliant, today and in the future.



### ACCELERATE

Digitize the experience you provide in the marketplace.

**READY TO TACKLE YOUR CYBERSECURITY AND TECHNOLOGY ISSUES?**

Reach out to us today!

**VC3.COM | 800-787-1160**





**PracticePanda**  
ELEVATE YOUR PRACTICE, SIMPLIFY YOUR LIFE

**Let us automate your marketing.**

**Email Marketing**

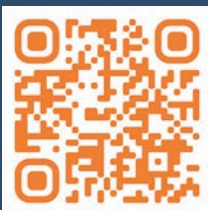
provides 70-80%  
retention rate

**Custom Newsletters**

build trust & loyalty  
with customers

**Video Marketing**

improves conversion  
rates by nearly 300%



**Start your free trial!**

Visit [www.PracticePanda.com](http://www.PracticePanda.com) today.



# DAY ONE \* MONDAY, NOV. 13

	REGULAR TRACK IN-PERSON OR LIVESTREAM			YP TRACK IN-PERSON ONLY
8-9 a.m.	<b>A1. Economic Update: Challenges and Resilience in the Minnesota Economy</b> <i>Ron Wirtz, Federal Reserve Bank of Minneapolis, Minneapolis, MN</i> FOS: Economics - Technical (1)   CFP: (1) L100 (Lower Level)			
9-9:20 a.m.	BREAK & EXHIBITS			
9:20-10:35 a.m.	<b>B1. Federal Individual Tax Highlights</b> <i>Pat Garverick, CPA, MT, CFP®</i> Taxes - Technical (1.5) IRS CE: (1)   CFP: (1.5) L100 (Lower Level)	<b>B2. Corporate Transparency Act: What CPAs and Our Clients Need to Know</b> <i>Ed Zollars, CPA</i> Taxes - Technical (1.5) IRS CE: (1)   CFP: (1.5) M100C (Mezzanine Level)	<b>B3. Transfer Pricing and Managing Global Intangibles</b> <i>Michael Bredahl, CPA (inactive), MBA</i> <i>Guy Sanschagrín, CPA/ABV, MBA</i> Taxes - Technical (1.5) IRS CE: (1)   CFP: (1.5) M100E (Mezzanine Level)	<b>B4. Accelerating Your Research Workflow for Young Professionals</b> <i>Tammy Nickels</i> Specialized Knowledge - Technical (1.5) IRS CE: (1)   CFP: (1.5) M101B (Mezzanine Level)
10:35-10:55 a.m.	BREAK & EXHIBITS			
10:55 a.m.-12:10 p.m.	<b>C1. Top 10 Residency Myths and Frequently Asked Questions</b> <i>Masha Yevzelman, JD</i> Specialized Knowledge - Technical (1.5) CFP (1.5) M100C (Mezzanine Level)	<b>C2. Partnership Hot Topics and Current Developments</b> <i>Adam Sweet, JD, LLM</i> Taxes - Technical (1.5) IRS CE: (1)   CFP: (1.5) L100 (Lower Level)	<b>C3. Sec. 1031 Under the Final Regulations: Opportunities and Potholes</b> <i>Chris Amico</i> <i>Roger Upton, CPA</i> Taxes - Technical (1.5) IRS CE: (1)   CFP: (1.5) Sponsored by MS Consultants M100E (Mezzanine Level)	<b>C4. Young Professionals 1120S Case Study</b> <i>Pat Garverick, CPA, MT, CFP®</i> Taxes - Technical (1.5) IRS CE: (1)   CFP: (1.5) M101B (Mezzanine Level)
12:10-1 p.m.	LUNCH   EXHIBITS			SESSION BEGINS WITH LUNCH
1-1:50 p.m.	<b>D1. Minnesota Department of Revenue Update</b> <i>Paul Marquart</i> Taxes - Technical (1) CFP: (1) L100 (Lower Level)	<b>D2. Employee Retention Credit: IRS Enforcement Activity, Potential Liabilities and Risks to CPAs</b> <i>Ed Zollars, CPA</i> Taxes - Technical (1) IRS CE: (1)   CFP: (1) M100C (Mezzanine Level)	<b>D3. Power BI in 10 Easy Steps</b> <i>Steve Yoss, Jr., CPA, MS</i> Computer Software & Applications - Non-Technical (1) M100E (Mezzanine Level)	<b>D4. Business and Dining Etiquette: Professionalism in the Workplace</b> <i>Deena Steinhaus</i> Personal Development - Non-Technical (2) Seasons (Second Level)
1:50-2:10 p.m.	BREAK & EXHIBITS			
2:10-3:25 p.m.	<b>E1. Being Ethical Is Harder Than You Think</b> <i>Bret Hood, MBA, CFE</i> Behavioral Ethics - Non-Technical (1.5) L100 (Lower Level)	<b>E2. Calculating the Proper Outside Basis for S Corporation and Partnership Interest Owners</b> <i>Ed Zollars, CPA</i> Taxes - Technical (1.5) IRS CE: (1)   CFP: (1.5) M100C (Mezzanine Level)	<b>E3. Inflation Reduction Act: Transforming 179D and 45L</b> <i>Todd French</i> Taxes - Technical (1.5) IRS CE: (1)   CFP: (1.5) Sponsored by Capstan Tax Strategies M100E (Mezzanine Level)	<b>E4. Young Professionals 1065 Case Study</b> <i>Pat Garverick, CPA, MT, CFP®</i> Taxes - Technical (1.5) IRS CE: (1)   CFP: (1.5) M101B (Mezzanine Level)
3:25-3:45 p.m.	BREAK & EXHIBITS			
3:45-5 p.m.	<b>F1. MN Legislative and Professional Update</b> <i>Geno Fragnito</i> <i>Linda Wedul, CAE</i> Business Management & Organization - Non-Technical (1.5) M100C (Mezzanine Level)	<b>F2. Federal Business Tax Highlights</b> <i>Pat Garverick, CPA, MT, CFP®</i> Taxes - Technical (1.5) IRS CE: (1)   CFP: (1.5) L100 (Lower Level)	<b>F3. The Anatomy of a Sales and Use Case: From Audit to Litigation</b> <i>Ben Wagner, JD</i> Taxes - Technical (1.5) CFP: (1.5) Sponsored by Wagner Tax Law, P.A. M100E (Mezzanine Level)	<b>F4. Excel Accelerator: Essential Skills for Young Professionals</b> <i>Steve Yoss, Jr., CPA, MS</i> Computer Software & Applications - Non-Technical (1.5) M101B (Mezzanine Level)
5-6 p.m.	HAPPY HOUR (registration suggested)   Seasons (Second Level)			

# Real People. Easy Solutions.

SharePoint Credit Union is your trusted financial partner, dedicated to helping you achieve your financial goals. Check us out at the MNCPA Tax Conference to explore our exclusive offerings tailored to meet your financial needs.

## Why Choose SharePoint Credit Union?

- **Unparalleled Member Service:** Our friendly, knowledgeable staff is here to assist you every step of the way.
- **Competitive Rates:** Enjoy higher savings and lower loan rates that maximize your financial potential.
- **Community Focused:** We proudly support our local community, giving back through various initiatives.
- **Convenient Access:** Access your accounts anytime, anywhere with our user-friendly digital banking.

SHARE  POINT  
CREDIT UNION

+

 **mncpa**

Elevate your impact.

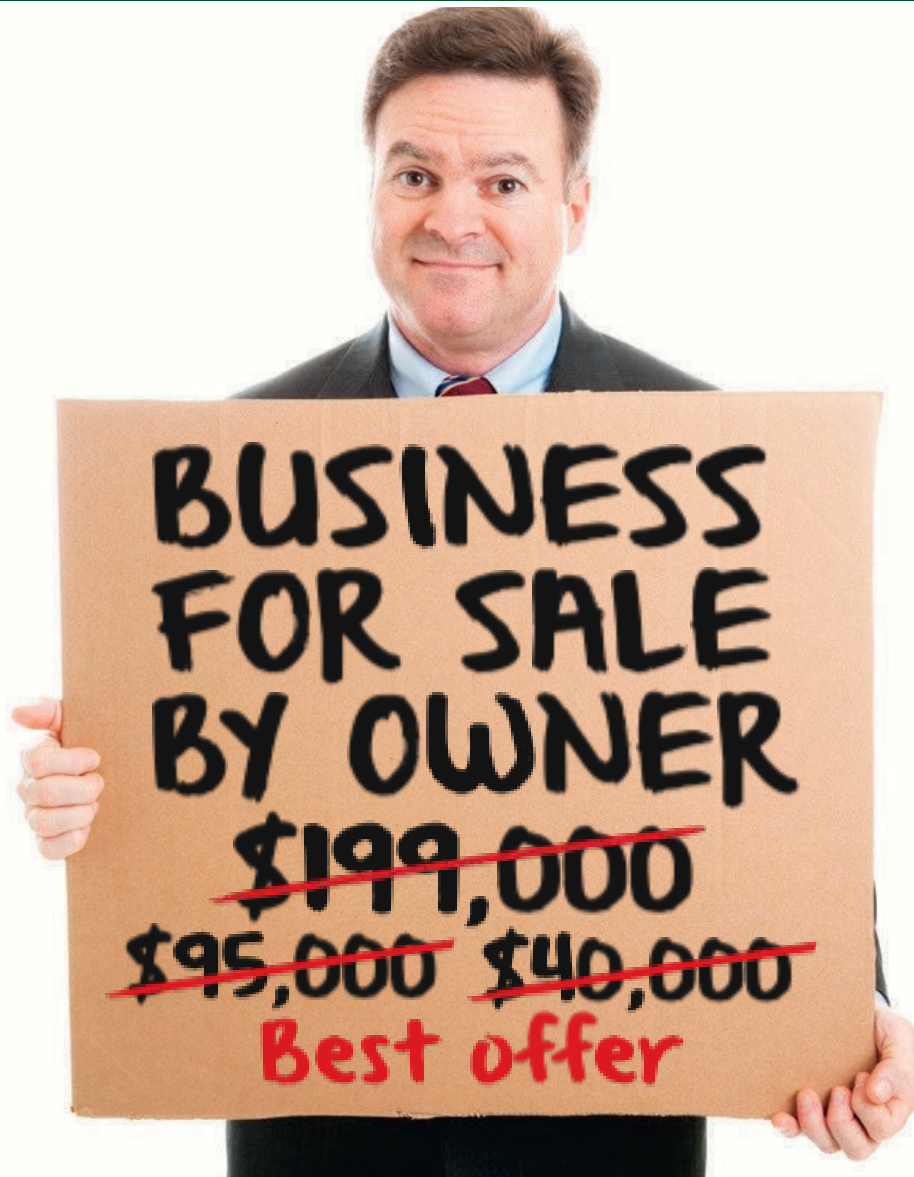
952.930.0700  
sharepointcu.com

Andover | Bloomington | Burnsville  
Medina | Plymouth | St. Louis Park

# DAY TWO \* TUESDAY, NOV. 14

	REGULAR TRACK IN-PERSON OR LIVESTREAM			YP TRACK IN-PERSON ONLY
8-9:25 a.m.	<b>G1. Navigating the Secure Act 2.0</b> <i>Susan Smith, CPA</i> Taxes - Technical (1.5) IRS CE: (1)   CFP: (1.5) L100 (Lower Level)	<b>G2. Choosing and Changing Business Entities</b> <i>Mark Sellner, CPA Retired, JD, LLM (taxation)</i> Taxes - Technical (1.5) IRS CE: (1)   CFP: (1.5) M100C (Mezzanine Level)	<b>G3. Is Outsourcing the Answer to Your High Turnover Challenges or Shortage of Resources?</b> <i>John McKenna</i> Personnel/Human Resources - Non-Technical (1.5) Sponsored by Accurant M100E (Mezzanine Level)	<b>G4. Young Professionals 1040 Case Study (Part 1)</b> <i>Pat Garverick, CPA, MT, CFP®</i> Taxes - Technical (1.5) IRS CE: (1)   CFP: (1.5) M101B (Mezzanine Level)
9:25-9:45 a.m. BREAK & EXHIBITS				
9:45-10:35 a.m.	<b>H1. Tax Traps for U.S. Persons With Foreign Financial Assets: FBAR and Form 8938 Reporting Requirements</b> <i>Kathy Emro, CPA, MBA</i> <i>Alina Hagness, MAcc, CPA</i> Taxes - Technical (1) IRS CE: (1)   CFP: (1) M100E (Mezzanine Level)	<b>H2. Cryptocurrency and NFTs: The New Frontier</b> <i>Susan Smith, CPA</i> Specialized Knowledge - Technical (1) IRS CE: (1)   CFP: (1) M100C (Mezzanine Level)	<b>H3. New AICPA Tax Ethics Rules</b> <i>Mark Sellner, CPA Retired, JD, LLM (taxation)</i> Regulatory Ethics - Technical (1) IRS CE: (1) L100 (Lower Level)	<b>H4. Young Professionals 1040 Case Study (Part 2)</b> <i>Pat Garverick, CPA, MT, CFP®</i> Taxes - Technical (1) IRS CE: (1)   CFP: (1) M101B (Mezzanine Level)
10:35-10:55 a.m. BREAK & EXHIBITS				
10:55 a.m.-12:10 p.m.	<b>I1. Federal Individual Tax Highlights (Repeat of B1)</b> <i>Pat Garverick, CPA, MT, CFP®</i> Taxes - Technical (1.5) IRS CE: (1)   CFP: (1.5) M100C (Mezzanine Level)	<b>I2. Mastering the Inflation Reduction Act</b> <i>Susan Smith, CPA</i> Taxes - Technical (1.5) IRS CE: (1)   CFP: (1.5) L100 (Lower Level)	<b>I3. Cybersecurity and the FTC Safeguards Rule: What You Need to Know to Protect Your Firm</b> <i>Kevin Fuller, MBA</i> Information Technology - Technical (1.5) Sponsored by VC3 M100E (Mezzanine Level)	<b>I4. Minnesota Individual Income Tax: M1 and Other Schedules</b> <i>Keri Reiter, CPA</i> Taxes - Technical (1.5) CFP: (1.5) M101B (Mezzanine Level)
12:10-1 p.m. LUNCH   GOVERNMENT RELATIONS LUNCH (registration required) <a href="#">Room 200</a>   EXHIBITS				
1-1:50 p.m.	<b>J1. Disconnect to Connect: Creating an Engaged Firm Culture One Employee at a Time</b> <i>Amy Vetter, CPA, CITP, CGMA, MBA, CSP, The B3 Method Institute, Chester, OH</i> Personal Development - Non-Technical (1) L100 (Lower Level)			
1:50-2:10 p.m. BREAK & EXHIBITS				
2:10-3:25 p.m.	<b>K1. Skill Up on Your Social Security Knowledge</b> <i>Rhonda Whitenack</i> Specialized Knowledge - Technical (1.5) CFP: (1.5) L100 (Lower Level)	<b>K2. Federal Business Tax Highlights (Repeat of F2)</b> <i>Pat Garverick, CPA, MT, CFP®</i> Taxes - Technical (1.5) IRS CE: (1)   CFP: (1.5) M100C (Mezzanine Level)	<b>K3. Your Greatest Leadership Challenge: A Look in the Mirror at Self-Leadership</b> <i>Jon Lokhorst, CSP, CPA, PCC</i> Personal Development - Non-Technical (1.5) M100E (Mezzanine Level)	<b>K4. Mastering Intermediate Excel: Skills for Young Professionals</b> <i>Steve Yoss, Jr., CPA, MS</i> Computer Software & Applications - Non-Technical (1.5) M101B (Mezzanine Level)
3:25-3:45 p.m. BREAK & EXHIBITS				
3:45-5 p.m.	<b>L1. Minnesota Income Tax Update</b> <i>Dan Kidney, CPA, JD</i> Taxes - Technical (1.5) CFP: (1.5) L100 (Lower Level)	<b>L2. Selling a Business: A Practical Guide to CPAs as Advisers to Business Owners</b> <i>Dan Mulvaney, CPA (Inactive)</i> Specialized Knowledge - Technical (1.5) M100C (Mezzanine Level)	<b>L3. Artificial Intelligence for Accounting and Financial Professionals</b> <i>Steve Yoss, Jr., CPA, MS</i> Specialized Knowledge - Technical (1.5) M100E (Mezzanine Level)	<b>L4. Young Professionals Career Development: Be the CEO of Your Career</b> <i>Jon Lokhorst, CSP, CPA, PPC</i> <i>Linda Wedul, CAE</i> Personal Development - Non-Technical (1.5) M101B (Mezzanine Level)

# Some Things are Better Left to the Experts



Are your clients seeking a trusted partner to navigate the complexities of selling their business? Transworld NorthStar is your go-to firm for seamless business transactions. Our specialized expertise, commitment to exceptional service, and stellar track record ensure a smooth and profitable sales process.

Come visit our booth in the exhibit hall to discover how we can partner in achieving success through navigating business sales together for your clients!

**Transworld Business Advisors NorthStar**

[www.tworldnorthstar.com](http://www.tworldnorthstar.com)

Phone: (888) 290-5232

Email: [minnesota@tworld.com](mailto:minnesota@tworld.com)

 **TRANSWORLD**  
Business Advisors  
Business Sales ♦ Mergers & Acquisitions ♦ Franchises

# DAY THREE \* WEDNESDAY, NOV. 15

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

# THE MNCPA BUZZ

## IN THE APP:

Spill the tea on your personal faves. We'll prompt you via the app with a question each day of the conference. Responses will be aggregated and shared post-event.

- **Monday:** What song makes you smile?
- **Tuesday:** What book are you reading right now?
- **Wednesday:** Scavenger hunt! What's around your house?

## YOUNG PROFESSIONALS GROUP (YPG)

[mncpa.org/ypg](https://mncpa.org/ypg)

Build your network through the MNCPA Young Professionals Group. You never know where new connections may lead — a new client, a referral or even a great friend. YPG events are where you go to have fun with a purpose!

## WE HAVE A LATTE TOOLS AND RESOURCES TO HELP YOU WITH THE DAILY GRIND, INCLUDING:

### CCH — MEMBERS ONLY

[mncpa.org/CCH](https://mncpa.org/CCH)

Beef up your research arsenal ahead of busy season with CCH. Members have access to select resources, including client engagement letters, journals and the GAAP guide. Stay tuned for a refreshed CCH user experience!

### CANNABIS RESOURCES — MEMBERS ONLY

[mncpa.org/cannabis](https://mncpa.org/cannabis)

CPAs are being called upon to be experts in the uncharted business world of adult-use cannabis. Access resources to navigate the HR, tax and client advisory questions ahead.

### ORDER CLIENT BROCHURES — MEMBERS ONLY

[mncpa.org/taxcampaign](https://mncpa.org/taxcampaign)

Help current and prospective clients understand the value you offer them. This year's brochure topics include tax planning and preparation, client accounting services, and changes to Form 1099-K. Stop by the MNCPA booth to pick up copies.

### UNDERSTAND BENEFICIAL OWNERSHIP INFORMATION REPORTING

[mncpa.org/BOI](https://mncpa.org/BOI)

Beginning Jan. 1, 2024, many U.S. companies will have to report information about their beneficial owners to the Financial Crimes Enforcement Network (FinCEN). How will your clients be impacted? Turn to the MNCPA for answers.

### BROADENING THE PATHWAY TO CPA LICENSURE

[mncpa.org/CPApathways](https://mncpa.org/CPApathways)

This year, we introduced legislation to broaden the pathways to CPA licensure. This conversation continues and we need your support. Stop by the MNCPA's booth to visit with MNCPA President Linda Wedul about this important initiative.

## NOT AN MNCPA MEMBER? JOIN TODAY?

## NEW MEMBERS SAVE 50%

[mncpa.org/join](https://mncpa.org/join)

MNCPA members pay less to attend TAX23. Want in on the savings? Join the MNCPA today and pay half the price for membership.

Quickly recoup the cost of joining through exclusive savings on CPE, YPG events and more.

# TAX23 CONNECTIONS

## IN PERSON:

### SWING BY THE MNCPA BOOTH

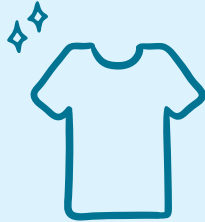
In person | Days 1, 2

Be sure to pay the MNCPA's booth a visit. The membership team is brewing up a ton of fun, including:



#### 10-KEY RACES

Compete to be named the fastest 10-keyer in TAX23 history!



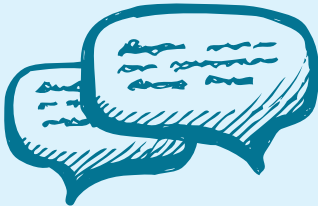
#### WIN A TAX23 T-SHIRT

Scour the halls for hidden T-shirt cards. Find a card, win a shirt!



#### SWEETEN UP YOUR BREW

Our selection of coffee syrups will mocha you very happy.



#### WHO'S MAKING HEADLINES?

**Extra! Extra!** Grab a cup of Joe and head on over to our TAX23 exhibitor and vendor booths. They'll give you the scoop on clues designed to help you solve the headline.



#### WHO'S HAPPY FOR HAPPY HOUR?

**Cheers to TAX23!** Join us as we toast being together with drinks, snacks and connections aplenty!

..... **NEED HELP WITH THE EVENT APP?** .....  
: Check out the how-to guidance on page 3,  
: stop by the MNCPA booth (in-person) or call the MNCPA at 952-831-2707.  
: .....

# Purposeful solutions. Dedicated service.

Wagner Tax Law provides businesses and individuals with purposeful solutions, dedicated service, and unparalleled expertise to help them address their tax matters with confidence.



**Wagner**  
TAX LAW

Minnesota's Trusted Tax Attorneys

[WagnerTaxLaw.com](http://WagnerTaxLaw.com) · (952) 921-2101



# TAKE ON TAX SEASON WITH CONFIDENCE

HEAD INTO BUSY SEASON — CONFIDENTLY — WITH THESE PROGRAMS FROM THE MNCPA.

## FEDERAL TAX UPDATES

- Hear the latest federal tax developments from expert practitioners who understand the issues you face.
- Get actionable insights you can apply right away.
- Earn 8 CPE (technical), 8 CFP, 8 IRS CE and 6.5 CLE credits simultaneously. Some specialty credits are pending approval.

Nov. 30 Virtual  
Dec. 5 Duluth  
Dec. 7 Alexandria  
Jan. 11 Bloomington or livestream

[www.mncpa.org/TaxUpdate](http://www.mncpa.org/TaxUpdate)

## FEDERAL TAX WEBINAR SERIES

- Stay in the know with quick, two-credit updates on new and timely federal tax topics.
- Learn from top-rated speaker Ed Zollars, CPA.
- Earn 2 CPE (technical) and 2 IRS CE (pending approval) per webinar.

Nov. 20 1-2:40 p.m.  
Dec. 11 1-2:40 p.m.  
Jan. 22 1-2:40 p.m.

[www.mncpa.org/TaxWebinars](http://www.mncpa.org/TaxWebinars)



## 2024 MNCPA CONFERENCE CALENDAR

Visit [www.mncpa.org/conferences](http://www.mncpa.org/conferences) to find details and the most up-to-date schedule.

May 20	Audits of Employee Benefit Plans Conference
June 3	Audits of School Districts Conference
June 11-13	Management & Business Advisers Conference (MBAC24)
June 17-18	Estate & Personal Financial Planning Conference
Aug. 14	Agriculture Tax & Accounting Conference
Sept. 26	Audits of Lawful Gambling Conference
Oct. 21	Audits of Local Governments Conference
Oct. 22	Not-for-Profit Conference
Oct. 30	Business Valuation Conference
Nov. 11-12	K2 Technology Conference
Nov. 18-20	Tax Conference (TAX24)





# CPA licensure legislation

Learn more about the MNCPA initiative to broadening the pathways



This year, the MNCPA introduced bipartisan-supported bills in the Minnesota Legislature to broaden the pathways to CPA licensure. Advocated for and supported by the MNCPA board, this legislation carries into the 2024 legislative session for discussion.

The profession is at a critical point. Declining high school graduation sizes, increasing demand for CPAs, increasing retirements and declining number of candidates sitting for the CPA exam are converging to severely restrict the number of CPAs who provide critical financial services and advice to communities, businesses and individuals.

This legislation builds off current licensing standards by offering two new pathways to licensure, including one that would call for 120 college credits and two years of work experience. We ask all stakeholders to step forward to be part of this discussion toward a positive change to address the CPA pipeline issue.



“The profession is facing a challenge and, potentially, a crisis if we don’t make changes that will attract

more students to the profession. As a board, we are seeking to explore other alternatives to meeting the 150-hour education credit requirement while maintaining the high degree of professionalism and standards expected of the CPA profession and its representatives.”

**Bob Cedergren, CPA**  
MNCPA board chair  
partner, Wipfli LLP

[mncpa.org/CPApathways](https://mncpa.org/CPApathways)



Elevate your impact.



# TAX24

Save the date: Nov. 18-20, 2024

More details will be announced in early 2024.

## HELP PLAN TAX24

Love the Tax Conference or  
want to make it better?

**Join the task force!**

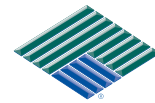
Contact Deb Griffith at [dgriffith@mncpa.org](mailto:dgriffith@mncpa.org)



## One banking relationship. Endless possibilities.

- Extended FDIC insurance solutions
- High-yield checking & savings accounts

**Booth #210 | (800) 320-7262**



**STEARNS  
BANK** N.A.

Member FDIC | Equal Housing Lender

Squeezed for capacity and barely keeping afloat, or  
trying to more narrowly focus your practice?

Do you have one-off Charitable Remainder or Lead Trust  
tax returns better outsourced to a trusted local specialist?

Come talk to us at our booth!



[Kyle@WeselyCPAs.com](mailto:Kyle@WeselyCPAs.com)

952-525-9630

[www.Calendly.com/Kyle-CPA](http://www.Calendly.com/Kyle-CPA)

[www.WeselyCPAs.com](http://www.WeselyCPAs.com)

10201 Wayzata Blvd, Ste. 330

Minnetonka, MN 55305

**WESELY & WESELY**  
CERTIFIED PUBLIC ACCOUNTANTS

# Promise.



Insurance coverage is ***really just a promise.***

Protect what's important to you with the promise of "we'll take care of you" from an agency and insurance company you trust.

Find out more about the Silver Lining and a special discount on home and auto insurance just for members of the Minnesota Society of CPAs. To find an agency near you, visit [thesilverlining.com](http://thesilverlining.com).



The worst brings out our best.®