

2025 UVM EXTENSION INCOME TAX SCHOOL
Agenda: South Burlington / Killington

Day 1 (Nov. 4, So. Burlington / Nov. 11, Killington)

8:15 – 8:25 a.m.	Introductions – Seth Anderson
8:25 – 9:15	Ag Issues (Ch. 8) - Alicia Marcy, EA; Jennifer Bouchard
9:15 – 10:05	New Legislation / International Tax Issues (Ch. 14) - Claude Schwesig, CPA; Kuroosh Sarafzade
10:05 – 10:20	Break
10:20 – 11:10	IRS Issues (Ch. 11) - Joe McCarthy, CPA
11:10 – 12:00 p.m.	Trusts and Estate Issues (Ch. 3) Molly Bucci, Esq.; Sandy Enman, CPA
12:00 – 12:10	Q & A
12:10 – 1:00	Lunch
1:00 – 1:50	Work Opportunity and R&D Update (Ch 14) - Elisia Laramée, CPA
1:50 – 2:40	Business Tax Issues (Ch. 4 / 9) - John Scheer, CPA
2:40 – 2:55	Break
2:55 – 3:45	Installment Sales (Ch. 5) - Jeff Fothergill, CPA
3:45 – 3:55	Q & A
3:55 – 4:00	Close

Evening Session

4:05 – 5:45 p.m.	Bonus Ethics (Ch. 1) - Ethics Scenarios Panel Discussion: Stephanie Machia, EA; Arlon Warner, EA; Joan Holloway, CPA
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Day 2 (Nov. 5, So. Burlington / Nov. 12, Killington)

8:15 – 8:25 a.m.	Introductions - Seth Anderson
8:25 – 9:15	Individual Issues / Home Ownership (Ch. 4) - Ashlie Smith
9:15 – 10:05	Vermont Dept. of Taxes - John Demeter, Lisa Pinkus (So. Burlington); Sharon Asay, CPA, & Renae DiGregorio (Killington)
10:05 – 10:20	Break
10:20 – 11:10	Religious and Tax-Exempt Organizations (Ch. 2) - Kerry Claffey
11:10 – 12:00 p.m.	New Legislation (Ch. 14) - Seth Anderson, EA
12:00 – 12:10	Q & A
12:10 – 1:00	Lunch
1:00 – 1:50	Retirement Issues (Ch. 6) – Lela McCaffrey, CPA, CFP
1:50 – 2:40	Retirement Issue / VT Saves (Ch. 6) - Jason Cadwell, CPA/PFS, CFP; Becky Wasserman, J.D.
2:40 – 2:55	Break
2:55 – 3:45	Rulings and Cases (Ch. 13) - Mark Langan, Esq.; Brian Murphy, Esq.
3:45 – 3:55	Q & A
3:55 – 4:00	Close - Seth Anderson

2025 UVM EXTENSION INCOME TAX SCHOOL
Continuing Education Credit Hours to IRS, IF Correct Name / PTIN provided

Day 1: 7-9 CE hours

Additional 2-hour evening session – Ethics

Day 2: 6-7 CE hours (Vt. Dept. of Taxes no CPE - Except for CPA's)

Total: 15 hours: EAs, AFSPs: 10 - Tax Law; 3 - Tax Update; 2 - Ethics (if Bonus Ethics taken)

16 hours: CPAs, 11 - Tax Law; 3 - Tax Update; 2 - Ethics (if Bonus Ethics taken)

If ONLY Day 1 taken: 7-9 hours of CPE

- 6 hours of Tax Law
- 1 hour of New Tax Law
- Additional 2 hours of Ethics if evening Bonus Ethics session taken

If ONLY Day 2 Taken: 6 - 7 hours of CPE

- 2 hours of New Tax Law
- 4 hours of Tax Law
- 1 hour if a CPA as State of Vermont counts

If Both days taken: NO Evening Bonus Ethics session

- 3 hours of New Tax Law
- 10 hours of Tax Law
- CPA's get 11 hours of Tax Law (Vt. Dept. of taxes CPAs only)

If Both days taken: With evening Bonus Ethics session

- 2 hours Ethics
- 3 hours of New Tax Law
- 10 hours of Tax Law (11 for CPAs)

To answer the occasional question:

Cannot count less than full hour, so if person leaves in the middle of an hour – does not get credit for that hour.