Agenda - 2019 UVM Income Tax School

**Day 1**  
**Nov. 5, Essex / Nov. 12, Killington**

8:15 – 8:25 a.m.  
Introductions - Seth Anderson

8:25 – 9:15  
QBI - Non-Specified Service Trade or Business (Ch. 1) - John Scheer, CPA

9:15 – 10:05  
QBI - SSTB (Ch. 2) - Seth Anderson, EA

10:05 – 10:25  
Break

10:25 – 11:15  
Investment and Retirement (Ch. 9) - Jason Cadwell, CPA/PFS, CFP

11:15 – 12:05 p.m.  
IRS Issues (Ch. 10) - Joe McCarthy, CPA

12:05 – 12:25  
Questions & Answers

12:25 – 1:15  
Lunch

1:15 – 2:05  
Ethics (Ch. 3) - Kyle Anderson, EA

2:05 – 2:55  
Trusts and Estate Issues (Ch. 6) - Molly Bucci, Esq.; Sherry Dempsey, CPA

2:55 – 3:15  
Break

3:15 – 4:05  
Business Issues (Ch. 11) - Patti Bisson, EA

4:05 – 4:25  
Questions & Answers

4:25 – 4:35  
Close – Seth Anderson

**Evening Session**

4:45 – 5:35 p.m.  
Bonus Ethics (Ch. 3) - Ethics Scenarios  
Panel Discussion - Stephanie Machia, EA; Arlon Warner, EA; Joan Holloway, CPA

**Day 2**  
**Nov. 6, Essex / Nov. 13, Killington**

8:15 – 8:25 a.m.  
Introductions - Seth Anderson

8:25 – 9:15  
International Tax Issues (Ch. 13) - Claude Schwesig, CPA

9:15 – 10:05  
Vermont Department of Taxes

10:05 – 10:25  
Break

10:25 – 11:15  
Individual Issues (Ch. 8) - Rick Renzelman, EA

11:15 – 12:05 p.m.  
Limited Liability Tax Issues (Ch. 4) - Ed Murphy, CPA, CFP

12:05 – 12:25  
Questions & Answers

12:25-1:15  
Lunch

1:15 – 2:05  
New Legislation (Ch. 12) - Ashlie Smith

2:05 – 2:55  
Real Estate Tax Issues (Ch. 5) - Jeff Fothergill, CPA

2:55 – 3:15  
Break

3:15 – 4:05  
Rulings and Cases (Ch. 15) - Mark Langan, Esq.; Brian Murphy, Esq.

4:05 – 4:25  
Questions & Answers

4:25 – 4:35  
Close - Seth Anderson
Continuing Education Credit Hours to IRS
(If Correct Name/PTIN Provided)

Day 1: 7-8 CE hours (+40 minutes - Q&A)
1 hour evening session – Ethics

Day 2: 6-7 CE hours (Vt. Dept. of Taxes no CPE - Except for CPA’s)
(+40 minutes – Q & A)

Note: 80 minutes Q&A = 1 hour of Tax Law

Total: 15 hours: EAs; AFSPs: 10 - Tax Law; 3 - Tax Update; 2 - Ethics (if Bonus Ethics taken)
16 hours: CPAs; 10 - Tax Law; 3 - Tax Update; 1 - Vt. Dept. of Taxes; 2 - Ethics (if bonus ethics taken)

If ONLY Day 1 taken: 6-8 hours of CPE
- 2 hours of New Tax Law
- 4 hours of Tax Law
- 1 hours of Ethics
- Additional 1 hour of Ethics if evening Bonus Ethics session taken

If ONLY Day 2 taken: 7 hours of CPE
- 1 hour of New Tax Law
- 5 hours of Tax Law
- 1 hour if a CPA as State of Vermont counts

If both days taken - NO Evening Ethics Bonus session
- 1 hour of Ethics
- 3 hours of New Tax Law
- 10 hours of Tax Law (80 minutes of Q&A = 1 CE hour)
- CPA’s get 1, 3, 11 hours of Tax law (Vt. Dept. of taxes CPAs only)

If Both days taken: With evening Ethics Bonus Session
- 2 hours Ethics
- 3 hours of New Tax Law
- 10 hours of Tax Law
- CPAs - 2, 3, 11 hours of Tax Law (credit for Vt. section)

To answer the occasional question:
1. Must attend at least 3 Q&A sessions to get credit for 1 hour of Tax Law (50-minute minimum).
2. Cannot count less than full hour; so participant who leaves in the middle of an hour does not get credit for that hour.
3. June 2014 Circ. 230 clarifies a 30-minute topic followed by 70-minute topic in same category qualifies for 2 hours.