

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
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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.