

7:30 - 9 a.m.

***Federal Tax Update/Opp Zones, Part 1**
Blaise Bender/Blaise C. Bender, PC/San Antonio

The sessions will provide a federal tax update for the upcoming tax season. Federal Tax Update, Part 1, will primarily focus on individual and estate tax matters. Sessions will include proposed legislation by the current administration, as well as judicial decisions, revenue rulings and revenue procedures.

9 - 9:10 a.m.

Break

9:10 - 10:10 a.m.

***Federal Tax Update/Opp Zones, Part 2**
Blaise Bender/Blaise C. Bender, PC/San Antonio

Part 2 will focus on general business matters.

10:10 - 10:20 a.m.

Break

10:20 - 11:35 a.m.

***Federal Tax Update/Opp Zones, Part 3**
Blaise Bender/Blaise C. Bender, PC/San Antonio

Part 3 will focus on business entities.

11:35 - 11:45 a.m.

Break

11:45 a.m. - 12:35 p.m.

Lunch Topic: ESG Reporting - A Gateway to Performance
Jennifer D. Sadenwater, CPA/Managing Director/ESG Lynk/Houston

In this session, participants will gain insight into how the ESG reporting process can help to identify strengths and weaknesses in an organization – presenting opportunities for strategic positioning. We will also discuss best practices among companies to prepare for future regulation over ESG-related disclosures.

12:35 - 12:45 p.m.

Break

12:45 - 2 p.m.

Cryptocurrency: Tax Enforcement by the IRS and DOJ Tax Division
Joshua D. Smeltzer, JD/Gray Reed & McGraw/Dallas

Cryptocurrency is emerging as a top priority for the IRS and the numbers of taxpayers who own or operate in the cryptocurrency space is increasing. A former Department of Justice, Tax Division litigator outlines both historical and current enforcement methods used by the IRS and DOJ to encourage compliance and enhance collection. The presentation will also cover common issues with cryptocurrency reporting and the latest guidance and litigation involving cryptocurrency for both investors and those operating cryptocurrency businesses.

2 - 2:10 p.m.

Break

2:10 - 3:40 p.m.

Legislative and Judicial Update
TBD

3:40 - 3:50 p.m.

Break

3:50 - 4:50 p.m.

International Tax Fundamentals
Nicholas Garza, Tax Partner/CRI/Dallas

The objective of this course is to gain a general understanding of the complexities of U.S. international tax. The session will address the residency rules and estate tax issues associated with individuals moving to the U.S. We'll also cover investments in foreign corporations, including Global Intangible Low Tax Income (GILTI) and the Section 962 election.

7:30 a.m. - 8:45 a.m. ***Economic Update**
TBD

8:45 - 8:55 a.m. **Break**

8:55 - 9:55 a.m. ***Advice from the Like-Kind Exchange Trenches**
Carla D. Janousek/Republic title of Texas/Dallas
Christopher Cunningham/Partner/Elliott, Thomason & Gibson, LLP/Dallas

On the surface, section 1031 like-kind exchanges seem like a simple concept. In practice, they are often anything but simple. Even in simple exchanges, there are not-so-simple requirements to meet and hidden traps to avoid. Join Carla Janousek of Texas Escrow Company, Inc., a Certified Exchange Specialist and qualified intermediary, and Christopher Cunningham of Elliott, Thomason & Gibson, LLP, a tax attorney, as they help you move beyond the basics of exchanges with advanced techniques and warnings about common errors taken straight out of their years of experience guiding exchangers.

9:55 - 10:05 a.m. **Break**

10:05 - 11:20 a.m. ***Energy Year End Updates: Legislation and Other Items of Relevance for the Energy Space**
Rob Myatt, CPA/Partner in Charge of Energy Practice - Tax Partner/Weaver LLP/Dallas

Although final legislation may not be passed, there are swirling winds of change in the energy space. There are many initiatives in current House and Senate proposals that will impact energy companies, their management teams and investors. This session will cover all potentially relevant changes, as well as other recent tax updates.

11:20 - 11:30 a.m. **Break**

11:30 a.m. - 12:20 p.m. **Lunch Topic: Get a G.R.I.P. and Grow in Peace**
Dena Jansen, CPA/Founder/CEO/Dena Speaks/Buda

Dena Jansen, CPA/Founder/CEO/Dena Speaks/Buda
The profession is constantly venturing into new frontiers and it's time we face the facts. Change is here to stay. Learning new things will be required, and it can be mentally and emotionally exhausting to navigate. But instead of leaning into anger or angst, there is a way to get a G.R.I.P. and grow in peace. Join Dena for a conversation on how we can reduce the overwhelm and tackle personal and professional growth challenges with a fresh and focused perspective.

12:20 - 12:30 p.m. **Break**

12:30 - 1:45 p.m. **When Theory Meets Practice: The R&D Tax Credit Study**
Lindsay Polyak/Partner/Tax Credit Collective/Dallas

Dena Jansen, CPA/Founder/CEO/Dena Speaks/Buda
The profession is constantly venturing into new frontiers and it's time we face the facts. Change is here to stay. Learning new things will be required, and it can be mentally and emotionally exhausting to navigate. But instead of leaning into anger or angst, there is a way to get a G.R.I.P. and grow in peace. Join Dena for a conversation on how we can reduce the overwhelm and tackle personal and professional growth challenges with a fresh and focused perspective.

1:45 - 1:55 p.m. **Break**

1:55 - 3:25 p.m.

PPP and Loan Forgiveness

Jana Kelly, CPA/Briggs & Veselka/Houston

The CARES Act provided enormous opportunities to companies impacted by the COVID-19 pandemic. Among the most important was the Paycheck Protection Program loan. While the loans were vital lifelines to companies, borrowers were frustrated by the changing legislation related to PPP loans and the forgiveness process. This session will discuss PPP loans and the related forgiveness process.

3:25 - 3:35 p.m.

Break

3:35 - 4:50 p.m.

SALT Update: Texas and Multistate Issues

Christina A. Mondrik, CPA, Esq., TBLS Board Certified - Tax Law, Mondrik & Associates/Austin

This presentation will focus on updates regarding the Texas sales tax, franchise tax and unemployment taxes administered by the Texas Workforce Commission, including legislative, regulatory and case law updates and the effects of remote workers on state tax compliance and multistate tax planning.

*Sessions with asterisk will swap days in San Antonio only on Dec. 6-7