

# TAX TRACK - Day 1



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.

**Navigating the Choppy Waters of a Texas Comptroller Audit and Managing Related Controversies**  
**David Colmenero, J.D., LL.M., CPA/Partner/Meadows Collier/Dallas**

Navigating a Texas tax audit can be a challenging affair, replete with traps for the unwary. And deciding when, where and how to challenge the Texas Comptroller on disputed issues are important strategic decisions that taxpayers should carefully consider. These affairs have become more complicated due to recent legislative, judicial and administrative developments. This presentation will discuss recent developments and the important new issues they present in navigating an audit and challenging the Texas Comptroller on disputed issues.

# TAX TRACK - Day 1 cont.



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.

# TAX TRACK - Day 2

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

# TAX TRACK - Day 2 cont.



12:30 - 1:45 p.m.

**\*When Theory Meets Practice: The R&D Tax Credit Study**  
**Lindsay Polyak/Partner/Tax Credit Collective/Dallas**

In theory, there are several methods to approach a client R&D tax credit study. The goal is always to maximize the credit while accurately depicting the activities and expenses involved. But what works best for one client may not work for another. This session will walk you through a case study of an Industrial Automation and Engineering client and how they maximize the R&D Credit."

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