



A Day On Tax with McNees

November 4, 2022

AGENDA

7:30 a.m. – 8:00 a.m. - Breakfast and Registration

8:00 – 8:10 a.m. - Opening Remarks

A preview of the day's content and an update on recent administrative, legislative and judicial developments in the state and local tax world. Emphasis will be placed on what tax changes may be coming to Pennsylvania.

8:10 – 9:00 a.m. - PA Property Tax Update

In this session, Paul Morcom will cover all the major issues in property tax assessments, including calculation, appeals, and countywide reassessments.

9:00 – 9:50 a.m. - PA Sales & Use Tax Update

In this session, Sharon Paxton will discuss all the recent PA sales and use tax issues including bulletins, pronouncements and statutory changes.

9:50 – 10:00 a.m. - Break

10:00 – 10:45 a.m. - PA Local Tax Update

In this session, Adam Koelsch will address current issues and trends surrounding the "nuisance taxes," such as the business privilege tax and amusement tax.

10:45 – 11:15 a.m. - PA Realty Transfer Tax Update

In this session, David Evenhuis will delve into the exemptions from Realty Transfer Tax and the various pitfalls that practitioners encompass when transferring property in Pennsylvania.

11:15 a.m. – 12:00 p.m. - PA SALT Litigation Update

In this session, Ryan Gonder will discuss all the recent SALT litigation at Commonwealth Court and the PA Supreme Court.

12:00 – 1:00 p.m. - Lunch/Speakers from PA Appeal Levels

Speakers to include: Ryan Froman, Tom Watson, and Neil McConnell

1:00 – 1:50 p.m. - Federal Tax Update

In this session, Justin Abodalo and Meghan Holjes will cover the Employee Retention Tax Credit as well as the most recent federal legislation, Inflation Reduction Act.

1:50 – 2:20 p.m. - Estate Planning Update

In this session, Andrew Rusniak will cover the current tax laws associated with gift and estate planning, including the annual gift exclusions and the lifetime gift and estate tax exemption amounts.

2:20 – 2:50 p.m. - ERISA Update

In this session, Renee Lieux will address recent employee benefit tax matters, including the IRS' new pilot program for plan audits and proposed IRS regulations affecting employee benefits, and other need to know employee benefit tax compliance reminders.

2:50 – 3:00 p.m. - Break

3:00 – 3:45 p.m. - Criminal Tax Update

Join McNees attorneys and experienced White Collar practitioners Sarah Hyser-Staub and Jim Clancy for a behind-the-scenes perspective on the many phases and nuances of Federal Criminal Tax cases; we will also provide an overview on certain local tax matters 'turning' criminal.

3:45 – 4:30 p.m. - M&A Tax Issues

In this session, Tim Finnerty and Justin Abodalo will discuss frequent federal tax issues impacting the purchase or sale of a business.

[REGISTER ONLINE HERE](#)

**If you have any questions,
please contact
Karen Swaringen at
kswaringen@mcneeslaw.com**

**REGISTRATION FEE
\$149.00**

(Fee includes continental breakfast, lunch,
cocktail hour and CPE or CLE credits.)

No Shows are Ineligible for Refunds

*Please join us for a social and
networking hour at the
conclusion of the seminar.*



The McNees SALT Group

McNees Wallace & Nurick LLC has served the legal needs of business and industry since 1935. Collectively, the members of the McNees State and Local Tax (SALT) group bring decades of experience in dealing with state and local taxes. The SALT group assists businesses, trade associations and non-profit entities in negotiating tax rulings, dealing with auditors, drafting and advocating for tax code amendments and obtaining tax exemptions. McNees SALT attorneys have handled thousands of tax appeals before administrative boards, trial courts and appellate courts.