



TAX

A Day On Tax with McNees

November 3, 2023

Register here



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 speakers.

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 taxing jurisdiction appeals, and upcoming county-wide 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 outfalls 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 – Chair of Board of Appeals, Tom Watson – Secretary of Board of Finance and Revenue and Neil McConnell – Chief of Office of Attorney General's Tax Litigation Section.

1:00 – 1:50 p.m. - Federal Tax Update

In this session Justin Abodalo and Tim Finnerty will discuss a variety of topics from the ERTC to the tax treatment of research and experimental expenses and a variety of current federal tax topics affecting taxpayers.

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, estate tax exemption amounts, and current planning techniques.

2:20 – 2:50 p.m. - ERISA/Employee Benefits Update

In this session, Renee Lieux will address the recent Secure 2.0 changes and other changes affecting your employee benefit plans.

2:50 – 3:00 p.m. - Break

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

In the ever-changing world of IRS priorities, it is sometimes difficult to figure out what the focus is. Join former 25-year IRS-CI veteran Tom Bishop and former 30-year federal prosecutor Jim Clancy as they chat about what is front-of-plate for the Service.

3:45 – 4:30 p.m. - M&A Tax Issues

Join Tim Finnerty and Justin Abodalo as they discuss a variety of tax issues that impact buyers and sellers of businesses.

If you have any questions,
please contact

Karen Swaringen, Events Administrator 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

[REGISTER ONLINE HERE](#)

*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.