

KEEP THIS SCHEDULE FOR YOUR RECORDSEnter minutes attended
for each session

(Please check all that apply)

		Minutes	
<u>Monday, October 19, 2026 (455 minutes available including Mid-Day program)</u>			
☐	9:00-10:30	Recent Federal Income Tax Developments	90
☐	10:45-12:00	Recent Federal Income Tax Developments (cont.)	75
☐	12:15-1:05	Mid-Day Program: Handling Tax Controversy in the Information Age (Sponsored by Chamberlain Hrdlicka)	50
☐	1:15-2:15	Taxation of Digital Assets: How Did We Get Here and Where Are We Going?	60
☐	2:15-3:15	Tax Legislative and Regulatory Outlook	60
☐	3:30-4:30	Felix and Oscar, Lucy and Ethel, Federal and State Income Tax Systems, and Other Odd Couples	60
☐	4:30-5:30	Using Lessons Learned to Navigate the Complexities of the BBA Partnership Audit Regime	60
<u>Tuesday, October 20, 2026 (490 minutes available including Mid-Day program)</u>			
☐	8:25-9:15	Current Developments in the Partnership Tax Arena	50
☐	9:15-10:05	Timing and Characterization of Deferred Payments	50
☐	10:20-11:10	Navigating Individual-Level Passthrough Loss Limitations	50
☐	11:10-12:00	Opportunities and Pitfalls under the Partnership Disguised Sale Rules	50
☐	12:15-1:05	Mid-Day Program: Rethinking IRS Collections (Sponsored by Wiggam Law)	50
☐	1:15-2:15	Current Developments in the Corporate Tax Arena	60
☐	2:15-3:15	Navigating Section 382: Practical Insights on Ownership Changes and NOL Limitations	60
☐	3:30-4:30	Opportunity Zones: Statutory Changes, OZ 2.0 Designations, Recent Guidance, Mandatory Reporting & Market Trends	60
☐	4:30-5:30	QSBS: Transactional Planning and Strategies	60
<u>Wednesday, October 21, 2026 (485 minutes available including Mid-Day program)</u>			
☐	8:30-9:45	Employee Benefits: An Annual Update to Laws, Regulations, Litigation, and IRS Staffing	75
☐	9:45-10:45	Employee Equity Compensation Granted by Privately Held Business Entities	60
☐	11:00-12:00	Accounting Methods Considerations in 2026: Navigating a Post-TCJA, OBBBA, and IRA Landscape	60
☐	12:15-1:05	Mid-Day Program: Resolving Family Trust and Estate Disputes (Sponsored by McGuireWoods)	50
☐	1:15-2:15	Managing an IRS Audit: Best Practices in Responding to IDRs and Strategic Considerations for Practitioners	60
☐	2:15-3:15	The Eye of the Storm: Bracing for Tax Enforcement in Uncertain Times	60
☐	3:30-4:30	Back to Basics on Research and Development Expenditures	60
☐	4:30-5:30	Ethical Guardrails for AI in Tax Practice <i>(submitted for 1.0 hour ethics credit)</i>	60
<u>Thursday, October 22, 2026 (515 minutes available including Mid-Day program)</u>			
☐	8:00-9:30	Recent Federal Wealth Transfer Tax Developments	90
☐	9:30-10:30	Demystifying Retirement Benefit Planning: Navigating the Post-2024 Rules	60
☐	10:45-12:00	Don't Guess and Make a Mess with QSBS	75
☐	12:15-1:05	Mid-Day Program: Hot Topics at the Intersection of Estate Planning and Business Valuation (Sponsored by MPI)	50
☐	1:15-2:15	A View from the Front Lines: Current Issues in Estate and Gift Tax Audits and Litigation	60
☐	2:15-3:15	Why Is Everybody Split on Whether Split Dollar Works?	60
☐	3:30-4:30	Current Developments Affecting Nonprofit Organizations and Charitable Giving	60
☐	4:30-5:30	When Trusts Own the Company: Navigating Tax, Estate, and Succession Planning While Keeping the Family Peace	60
<u>Friday, October 23, 2026 (285 minutes available)</u>			
☐	8:00-9:00	Looking for Basis in All the Right Places: Income Tax Basis Adjustments in Estate Planning & Administration	60
☐	9:00-10:00	Succession Planning for Estate/Tax Planning Professionals <i>(submitted for 1.0 hour ethics credit)</i>	60
☐	10:15-11:30	Family Office and Private Trust Company Design: Overview of Different Models & Their Tax and Non-tax Considerations	75
☐	11:30-1:00	Own Nothing, Control Everything	90

TOTAL MINUTES ATTENDED

Total minutes for program including Mid-Days: 2,230 (Mon-455 min; Tues-490 min; Wed-485 min; Thurs-515 min; Fri-285 min)
Total minutes for program (not including Mid-Days): 2,030 (Mon-405 min; Tues-440 min; Wed-435 min; Thurs-465 min; Fri-285 min)