Agenda – MTF – Printable

Day One–Wednesday, November 1

7:00 AM	Registration & coffee	
7:45-8:00	Opening Remarks	Rick Nadeau - SCORE
8:00-8:50	*Keynote Speaker* Corporate International Tax Issues	Stephen Shay, Senior Lecturer on Law Harvard Law School
8:55-9:45	Ethics	Kelly Young, Attorney Troubh Heisler
9:45-9:55	Break	
9:55-10:45	*Breakout Session 1* A: Doing Business in Canada *Breakout Session 1* B: Management Alignment: Driving Execution and Higher Performance Teams May not be eligible for CE credit	Stuart Lyons, CPA, MST, MBA Baker Newman Noyes John D. Ela, CEO Ela Management Group, LLC
10:50-11:40	Grantor Trusts	Jere Doyle, Senior VP BNY Mellon Wealth Management
11:45-12:45	LUNCH	
12:45-1:35	*Breakout Session 2* A: Estate Planning - Non Taxable Estate	Kenleigh Nicoletta, Attorney Brann & Isaacson
12:45-1:35	*Breakout Session 2* B: State Nexus & Tax Apportionment	Jonathan Block, Attorney, Partner Pierce Atwood LLP
1:40-2:30	Taxation of Legal Marijuana - -- Marijuana Legalization in Maine	Peter Dufour, CPA, JD, MBA Dufour Tax Group, LLC Edward (Ted) Kelleher, Attorney Drummond Woodsum Law
2:30-2:40	Break	
2:40-3:30	Minimization of Taxes in Real Estate Transactions	Christopher Stevenson, Attorney Drummond Woodsum Law Jeffrey Hiatt MS Consultants, LLC

3:35-4:25	Corporate Income Tax - Current Topics	Nelson Toner, Esq. Bernstein Shur, Counselors at Law

Day Two–Thursday, November 2

7:00 AM	Registration & coffee	
7:45-8:00	Opening Remarks	Rick Nadeau - SCORE
8:00-8:50	*Practice Management* How to Create a Culture of Privacy & Security Within Your Organization	Robert Ferrini, Program Manager McGowan Pro
8:55-9:45	IRS Audit Practices: Face-to-Face Field Exams	Mary Beth Murphy, Commissioner, Internal Revenue Service Small Business/Self-Employed Division Internal Revenue Service
9:45-9:55	Break	
9:55-10:45	Private Foundations	Katherine Holbrook Biotti, Senior Managing Director Jeffrey D. Haskell, J.D., LL.M. Foundation Source
		Justin Coffin, Financial Advisor UBS Rockland Financial Group
10:50-11:40	Where are we with the ACA - Repeal or Status Quo?	William Enck, CPA, CPC, APA - Principal BerryDunn Roger Prince, Senior Manager, JD, APA BerryDunn
11:45-12:45	LUNCH	
12:45-1:35	Lost in Translation: From the Partnership g Agreement to the Tax Return	Christopher McLoon, Attorney Drummond Woodsum Law
		Cory Vargo, CPA, MST, Tax Manager Macpage LLC
1:40-2:30	Common Mistakes in the Administration of IRAs Retirement Plan Trends	Timothy Woodhouse, CPA, JD Cribstone Capital Management
		Rene Morin, CPA, CEBS, President Downeast Pension Services
2:30-2:40	Break	
2:40-3:30	Special Needs Planning: The Right Tool for the Job	Jane Skelton, Attorney Maine Elder Law Firm

3:35-4:25	Individual Tax Updates	Jeffrey Hicklin, CPA Dawson, Smith, Purvis & Bassett, P.A.