Agenda – MTF – Printable

Day One—Wednesday, November 2

7:00 AM	Registration & coffee	
7:45-8:00	Opening Remarks	Ron Dillon - SCORE
8:00-8:50	*Keynote Speaker* Taxpayer Advocate Services	Nina Olson Taxpayer Advocate Service
8:55-9:45	Maximizing Depreciation with Cost Segregation	Jeff Hiatt Director New Business Development, M S Consultants, LLC
9:45-10:00	Break	
10:00-10:50	Differences Between IRAs and Employer Plan Accounts	Richard A. Carriuolo, CFP VP & Director of Wealth Mgt, R.M. Davis, Inc.
		Timothy W. Woodhouse,CPA,JD Senior Vice President, Acadia Trust, N.A.
10:55-11:45	Like Kind Exchanges Under IRS Code Section 1031	S. Andrew Smith, CPA Baker Newman Noyes
11:45-12:30	LUNCH	
12:35-1:25	*Breakout Session* A: Rendering Services in Canada - Overview of Canadian Tax Implications	Stuart Lyons, CPA,MST,MBA Baker Newman Noyes
		Cristina Morera, EA Senior Manager, Baker Newman Noyes
12:35-1:25	*Breakout Session* B: ACA Update for Large Employers	Christopher G. Stevenson, Esq. Attorney, Drummond Woodsum
1:30-2:20	*Breakout Session* A: Tax Exempt Organizations - Federal and State Issues	Leonard Cole, Esq. Attorney at Law, Cole Nonprofits Law, LLC
1:30-2:20	*Breakout Session* B: Selected Issues in Taxation of Natural Resources	Lee Chick, CPA
2:20-2:35	Break	

2:35-3:25	Individual Tax Planning 2016/2017	Sarah Desormiers, JD, CPA President, Integrated Tax Consultants
3:30-4:20	Corporate Income Tax Topics	Nelson Toner, Esq Bernstein Shur, Counselors at Law

Day Two–Thursday, November 3

7:00 AM	Registration & coffee	
7:45-7:55	Opening Remarks	Rick Nadeau - SCORE
7:55-8:45	*Ethics* Circular 230 and Prior Year Indiscretions	Kelley Young, Esq Troubh Heisler Cory Vargo, Tax Manager MacPage
8:50-9:40	*Ethics* Risk Management in Tax Engagements	John Raspante, Senior VP North American Liability Insurance Agency
9:40-9:55	Break	
9:55-10:45	Choosing and Funding a Retirement Plan for Your Business	Josh Chase, CFP & Financial Advisor Lebel Harriman
		Rene Morin, CPA, CEBS Downeast Pension Services
10:50-11:40	Income Taxation of Trusts and Estates - Fundamentals	Jere Doyle, Senior VP BNY Wealth Management
11:40-12:25	LUNCH	
12:25-1:15	Tax-related Identity Theft	Shawn Savage, Senior Stakeholder Liason Internal Revenue Service
		Andy Grover, CPA, CFE Bangor Savings Bank
1:20-2:10	Tax Advantages of ESOPs: Succession Planning	Joan McCabe ADS Benefits
		Ed Feibel, Counsel Eaton Peabody
		Leslie Hallock, Senior Counsel Eaton Peabody
2:10-2:25	Break	
2:25-3:15	New Partnership Audit Rules	Chris McLoon, Attorney Drummond Woodsum

3:20-4:10	State Law Updates as Related to Federal Law	Jonathan Block, Esq. Partner, Pierce Atwood LLP