

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	<i>Keynote Speaker</i> 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	DISCS & Canadian Taxes	Stuart Lyons, CPA, MST, MBA Baker Newman Noyes
10:50-11:40	Grantor Trusts	Jere Doyle, Senior VP BNY Mellon Wealth Management
11:45-12:45	LUNCH	
12:45-1:35	<i>Breakout Session A:</i> Estate Planning - Non Taxable Estate	Kenleigh Nicoletta, Attorney Brann & Isaacson
12:45-1:35	<i>Breakout Session B:</i> State Nexus & Tax Apportionment	Jonathan Block, Attorney, Partner Pierce Atwood LLP
1:40-2:30	Individual Income Tax/Marijuana Issues	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 - Recent Cases and Rulings	Nelson Toner, Esq. Bernstein Shur, Counselors at Law
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Day Two—Thursday, November 2

7:00 AM	Registration & coffee	
7:45-8:00	Opening Remarks	Rick Nadeau - SCORE
8:00-8:50	<i>Practice Management</i> 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 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	Turning an Operating Agreement into a Tax Return	Christopher McLoon, Attorney Drummond Woodsum Law
		Cory Vargo, CPA, MST, Tax Manager Macpage LLC
1:40-2:30	Retirement Plan Updates	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 for Individuals with Disabilities	Jane Skelton, Attorney Maine Elder Law Firm

3:35-4:25

Individual Tax Updates

TBD