

# Agenda – TPI – Printable

## Day One

7:00 AM	Registration & coffee	
7:45-8:00	Opening Remarks	
8:00-8:50	Protect Your Clients: Protect Yourself	Shawn Savage, Senior Stakeholder Liason Internal Revenue Service
8:55-9:45	Ethics	Justin Coffin, Esq.
		Kelley Young, Esq. Trough Heisler
9:45-10:00	Break	
10:00-10:50	Individual Tax Planning	Sarah Desormiers, JD, CPA President, Integrated Tax Consultants
10:55-11:45	Sole Proprietorship; Partnerships; S Corporations	Sno Barry, CPA Berry Dunn
		Justin Morren, Senior Tax Specialist Berry Dunn
11:45-12:30	LUNCH	
12:30-1:20	Funding a Retirement Plan for Your Small Business	Josh Chase, CFP & Financial Advisor Lebel Harriman
1:25-2:15	Estate Planning for the Business - Succession & Exit Plans	Portland & Augusta Robert Danielson, Esq. Law Office of Robert Danielson Bangor Jeff Jones, Esq. & Rebecca Sargent, Esq. Jones, Kuriloff & Sargent
2:15-2:30	Break	
2:30-3:20	Affordable Care Act's Impact on Small Business	Joel Allumbaugh, President & CEO The Allumbaugh Agency
3:25-4:15	MRS Updates as Related to Federal Law	Sandra Lind Maine Revenue Services