

# Agenda – TPI – Printable

7:00 AM	Registration & coffee	
7:45-8:00	<b>Opening Remarks</b> Forum Organization & Ground Rules	
8:00-8:50	<b>Ethical Challenges for Today's Practitioner</b>	<b>John Raspante, Senior VP, Director of Risk Management</b> CPA Protector Plan
8:55-9:45	<b>IRS Updates</b>	<b>Shawn Savage, Senior Stakeholder Liaison</b> Internal Revenue Service
9:45-10:00	Break	
10:00-10:50	<b>Retirement Savings &amp; Distribution Planning for a Form 1040</b>	Augusta & Brewer <b>Steve Scott, Partner</b> Retirement Solution Group ----- Portland <b>Christie Cheng, Principal</b> Retirement Solution Group
10:55-11:45	<b>Buying &amp; Selling Pass-Through Entities</b>	<b>Sno Barry, CPA, Principal</b> Berry Dunn <b>Justin Morren, Senior Tax Specialist</b> Berry Dunn
11:45-12:30	LUNCH	
12:30-1:20	<b>Employment Issues</b>	<b>James Wade, Attorney</b> Law Office of James D. Wade
1:25-2:15	<b>Private Foundations, Donor Advised Funds and Impact Investing</b>	<b>Justin Coffin, Financial Advisor</b> UBS Rockland Financial Group
2:15-2:30	Break	
2:30-3:20	<b>Beneficiary &amp; Estate Issues</b>	Brewer <b>Jeff Jones, Esq.</b> Jones, Kuriloff & Sargent Augusta & Portland <b>Robert Danielson, Esq.</b> Law Offices of Robert E. Danielson
3:25-4:15	<b>MRS 2017 Income/Estate Tax Updates</b>	<b>Sandra Lind, Tax Section Manager</b> Maine Revenue Services
4:15-4:30	Hand Out CE Certificates	