

Agenda – TPI – Printable

7:00 AM	Registration & coffee	
7:45-8:00	Opening Remarks Forum Organization & Ground Rules	
8:00-8:50	Ethics	John Raspante, Senior VP, Director of Risk Management NAPLIA
8:55-9:45	IRS Communications and Outreach	Shawn Savage, Senior Stakeholder Liaison Internal Revenue Service
9:45-10:00	Break	
10:00-10:50	Retirement, Savings & Distribution Planning for a Form 1040	Annette Lease, CTFA
10:55-11:45	Buying & Selling of Pass-Through Entities	Sno Barry, CPA, Principal Berry Dunn Justin Morren, Senior Tax Specialist Berry Dunn
11:45-12:30	LUNCH	
12:30-1:20	Employment Issues	James Wade, Attorney Law Office of James D. Wade
1:25-2:15	Private Foundation and Donor Advised Funds	Justin Coffin, Financial Advisor UBS Rockland Financial Group
2:15-2:30	Break	
2:30-3:20	Beneficiaries & Estates	Brewer Jeff Jones, Esq. & Rebecca Sargent, Esq. Jones, Kuriloff & Sargent Augusta & Portland Robert Danielson, Esq. Law Offices of Robert E. Danielson
3:25-4:15	MRS Updates as Related to Federal Law	Sandra Lind, Tax Section Manager Maine Revenue Services
4:15-4:30	Hand Out CE Certificates	