



VIRTUAL TAX FORUM & EXPO 2020

All courses qualify as Federal Tax Law Topic unless otherwise indicated.

NASBA: All sessions are tentatively accepted by the National Association of State Boards of Accountancy. Certified Public Accountants should check with their specific State Board of Accountancy to ensure their sessions meet those requirements.

Tuesday, Oct. 20			
9:00 a.m. – 10:40 a.m. CT	#02	Client Representation Process Reynolds Basic	#11 RMDs Latest Guidance Lent-Paul Update
		●	U ● ■
11:00 a.m. – 12:15 p.m. CT	Expo hall: Meet with exhibitors		
12:15 p.m. – 1:55 p.m. CT	#05	Individual & Business Updates Strombom Update	
		U ● ■	
2:25 p.m. – 4:05 p.m. CT	#06	IRS Notices Overview Reynolds Basic	#09 Liquidating a Corporation Cardaropoli Intermediate
		●	●
4:35 p.m. – 6:15 p.m. CT.	#10	Qualifying Dependent & Tax Credits Strombom Basic	#07 Life Estates for Property Transfers Tritz Intermediate
		● ■	● ■

CPE Key

- = Qualifies for IRS, CTEC
- = Qualifies for Certified Financial Planners™ Board
- E = Qualifies for Ethics Credit
- U = Qualifies for Federal Tax Law Update

Wednesday, Oct. 21

9:00 a.m. – 10:40 a.m. CT	#01 529 Plans & ABLE Accounts Keane Basic ● ■	#08 Like-Kind Exchanges Tritz Intermediate ●
11:00 a.m. – 12:15 p.m. CT	Expo hall: Meet with exhibitors	
12:15 p.m. – 1:55 p.m. CT	#11 RMDs Latest Guidance Lent-Paul Update U ● ■	#03 Foreign Tax Credit Cardaropoli Basic ● ■
2:25 p.m. – 4:05 p.m. CT	#12 S Corporation Shareholder Basis Keane Basic ● ■	#09 Liquidating a Corporation Cardaropoli Intermediate ●
4:35 p.m. – 6:15 p.m. CT.	#13 Sale of a Residence & Form 4797 Lent-Paul Basic ● ■	#08 Like-Kind Exchanges Tritz Intermediate ●

Thursday, Oct. 22

9:00 a.m. – 10:40 a.m. CT	#10 Qualifying Dependent & Tax Credits Strombom Basic ● ■	#12 S Corporation Shareholder Basis Keane Basic ● ■
11:15 a.m. – 12:55 p.m. CT	#13 Sale of a Residence & Form 4797 Lent-Paul Basic ● ■	#07 Life Estates for Property Transfers Tritz Intermediate ● ■
1:35 p.m. – 3:15 p.m. CT	#04 Ethics & Due Diligence Strombom Basic E ●	

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