



WEDNESDAY (6/5)

WEDNESDAY

5:00 – 6:00 PM

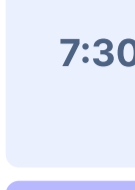
Registration Table Open

1 hour

6:00 – 8:00 PM

Welcome Reception

2 hours



THURSDAY (6/6)

THURSDAY

7:30 – 8:30 AM

Check-in

1 hour

8:30 – 10:30 AM

Welcome

MAIN STAGE

Comprehensive Tax and Legal Consult: 3 Case Studies EVERY Tax Advisor needs to Know (CE)

with Mark J. Kohler

2 hours

10:30 – 11:00 AM

Break

Coffee & Snacks

30 mins

11:00 – 12:00 PM

Breakout Sessions

1 hour

ROOM A

Short-Term versus Long-Term Rentals: The Loophole and the Strategies (CE)

with Bobby Bodner

ROOM B

The Truth About Life Insurance for Wealth Building and Tax Savings (CE)

with Randy Leubke

ROOM C

Navigating Payroll Needs for Your Clients: Options and Proper Procedures if you embark on a Payroll Service (CE)

with Tammie Lowes

12:00 – 1:30 PM

Patio Lunch (Premium & VIP)

1 hour 30 mins

1:30 – 2:30 PM

Breakout Sessions

1 hour

ROOM A

Health Savings Account (HSA) v Health Reimbursement Arrangement (HRA): Which one is Best? (CE)

with Aaron Siegel

ROOM B

Estate Planning for Every Business Owner: Will versus Trust (CE)

with Ashley Burr

ROOM C

Multi-Entity Structuring and Tax Reporting with the 1065 and 1120S (CE)

with Marit Burmood

2:30 – 2:45 PM

Break

15 mins

2:45 – 3:45 PM

Breakout Sessions

1 hour

ROOM A

Intangible Drilling Cost (IDC) Deduction: When it's Perfect for Your Client (CE)

with Michael Maucelli

ROOM B

The Ideal Charitable Remainder Trust (CRT) for a Client facing a Big Capital Gain (CE)

with Max Merritt

ROOM C

IRS Resolution Basics and Dealing with the IRS (CE)

with Farah Saleh

3:45 – 4:00 PM

Break

15 mins

4:00 – 5:00 PM

MAIN STAGE

Marketing Your Business and Branding with Carter Cofield

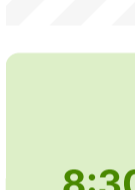
1 hour

6:00 – 9:00 PM

VIP Experience

1920's Salt Lake Speak Easy Cocktails, Dinner, and Gambling

3 hours



FRIDAY (6/7)

FRIDAY

7:00 – 7:45 AM

Yoga on Lawn OR Walking Tour

45 mins

8:30 – 9:30 AM

MAIN STAGE

Key Note Speaker

with Mark J. Kohler

1 hour

9:30 – 10:30 AM

MAIN STAGE

The Boundaries of giving Financial Advice as a Tax Advisor and Guest Panel (CE)

with Mark J. Kohler

1 hour

10:30 – 11:00 AM

Break

Coffee & Snacks

30 mins

11:00 – 12:00 PM

Breakout Sessions

1 hour

ROOM A

Preparing for the Enrolled Agent or CPA Exam: When and why it makes sense for a Tax Advisor (CE)

with Roger Knetch

ROOM B

Cost Segregation: When to Use it and When it's a Waste of Money (CE)

with Mande Clark

ROOM C

Understanding Crypto Currency and associated tax and legal strategies (CE)

with Bobby Bodner & Darren Cherrington

12:00 – 1:30 PM

Patio Lunch (Premium & VIP Women's Lunch Panel)

1 hour 30 mins

1:30 – 2:30 PM

MAIN STAGE

Building a Legacy with Your Trifecta

with Mark J. Kohler

1 hour

2:30 – 2:45 PM

Break

15 mins

2:45 – 3:45 PM

Breakout Sessions

1 hour

ROOM A

Current Issues using the 1031: They're Alive and Well (CE)

with Scott Saunders

ROOM B

The Truth About Asset Protection: What works and the Cost-Benefit Analysis (CE)

with Darren Cherrington

ROOM C

Internet Taxation: When Sales and State Tax is applicable (CE)

with Marit Burmood

3:45 – 4:00 PM

Break

15 mins

4:00 – 5:00 PM

Breakout Sessions

1 hour

ROOM A

Tax Planning for Undocumented Workers and Residents (CE)

with Diva Mejias

ROOM B

How to Help a Client Self-Direct their Retirement Account into ANY Asset (CE)

with Mat Sorensen

ROOM C

State Tax Reporting: Determining Nexus and Apportionment (CE)

6:00 – 9:00 PM

Carnival Party

Buffet, Drink Tickets, Salsa Dancing Instruction

General Admission - \$50 a person

3 hours



SATURDAY (6/8)

SATURDAY

7:00 – 7:45 AM

Yoga on Lawn OR Walking Tour

45 mins

8:00 – 9:15 AM

Main Street Tax Pro Member Breakfast

1 hour 15 mins

9:15 – 9:30 AM

Break

15 mins

9:30 – 10:30 AM

MAIN STAGE

The Greatest Mindset Challenges Facing Advisors today with Aimee Gianni

with Mark J. Kohler & Patti Britt Campbell

1 hour

10:30 – 11:00 AM

Break

Coffee & Snacks

30 mins

11:00 – 12:00 PM

Breakout Sessions

1 hour

ROOM A

401k Options for the Small Business Owners: Solo v. Safe Harbor (CE)

with Kevin Kennedy

ROOM B

Helping a Client Buy or Sell a Business: What You Need to Know (CE)

with Mark Fetzer

ROOM C

Reporting Cryptocurrency Transactions (CE)

with Colleen Sawatsky

12:00 – 1:30 PM

Patio Lunch (Premium & VIP)

1 hour 30 mins

1:30 – 2:30 PM

Breakout Sessions

1 hour

ROOM A

The Consultation: How to Connect with Your Client

with Patti Campbell

ROOM B

Legal Planning for Raising Money and Partnerships (CE)

with Mark Fetzer

ROOM C

Tax Strategies for the 1% and the Wealthy (CE)

with Randy Luebke & Kevin Kennedy

2:30 – 3:00 PM

Break

Coffee & Snacks

30 mins

3:00 – 4:00 PM

MAIN STAGE

Finding, Recruiting, Hiring & Training Employees Panel

1 hour

4:00 – 5:00 PM

MAIN STAGE

Setting Goals and Scaling in 2024 Final Giveaways and Farewell

1 hour