

TAX & LEGAL 360 WEDNESDAY (6/5)

5:00 – 6:00 PM **Registration Table Open** 1 hour

6:00 – 8:00 PM **Welcome Reception** 2 hours

TAX & LEGAL 360 THURSDAY (6/6)

7:30 – 8:30 AM **Check-in** 1 hour

8:30 – 10:30 AM **Welcome** 2 hours
MAIN STAGE
 3 Case Studies That Could Change Your Life (CE)
 with Mark J. Kohler

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 **Marketing Your Business and Branding - The "Marketing Matrix"** 1 hour
MAIN STAGE

6:00 – 9:00 PM **VIP Experience** 3 hours
 1920's Salt Lake Speak Easy
 Cocktails, Dinner, and Gambling

TAX & LEGAL 360 FRIDAY (6/7)

7:00 – 8:00 AM **Walking Tour** 1 hour

8:30 – 9:30 AM **3 Case Studies: Building Wealth with Tax Savings and Asset Protection** 1 hour
MAIN STAGE
 with Mark J. Kohler

9:30 – 10:30 AM **The Boundaries of giving Financial Advice as a Tax Advisor and Guest Panel (CE)** 1 hour
MAIN STAGE
 with Mark J. Kohler

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: When and why it makes sense for a Tax Advisor (CE)

with Roger Knetch

ROOM B

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

with Mat Sorensen

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 Power Panel)** 1 hour 30 mins

1:30 – 2:30 PM **Building a Legacy with Your Trifecta** 1 hour
MAIN STAGE
 with Mark J. Kohler

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 Resident Aliens (CE)

with Diva Mejias

ROOM B

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

with Mande Clark

ROOM C

State Tax Reporting: Determining Nexus and Apportionment (CE)

6:00 – 9:00 PM **Samba Night** 3 hours
 Buffet, Drink Tickets, Salsa Dancing Instruction
 VIP & Premium, Available to General Audience on purchase

TAX & LEGAL 360 SATURDAY (6/8)

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 **The Greatest Mindset Challenges Facing Advisors today with Aimee Gianni** 1 hour
MAIN STAGE
 with Mark J. Kohler & Patti Britt Campbell

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
 Sponsored by Lifetime Paradigm

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 **Guest Panel: Finding, Recruiting, Hiring & Training Employees** 1 hour
MAIN STAGE

4:00 – 5:00 PM **Setting Goals and Scaling in 2024** 1 hour
MAIN STAGE
 Final Giveaways and Farewell