

2021 OSCP Northwest Federal Tax Conference™

Webcast

Monday and Tuesday, October 25-26, 2021

DAY ONE: Monday, October 25, 2021

- 7:30 – 8:00 a.m. *Registration Opens*
- 8:00 – 8:05 a.m. *Welcome and Opening Remarks*
- 8:05 – 9:35 a.m. **Revisiting Choice of Entity in Light of Tax Changes on the Horizon**
Larry Brant, Attorney
Foster Garvey PC, Portland, OR
- 9:35 – 9:50 a.m. *Break*
- 9:50 – 11:50 a.m. **Critical Estate Planning Concerns**
Steven Siegel, JD, LLM (Taxation)
The Siegel Group, Morristown, NJ
- 11:50 a.m. – 12:50 p.m. *Lunch*
- 12:50 – 2:50 p.m. **Will There Be a Second Century for 1031 Property Exchanges?**
Max Hansen, JD, CES
Accruit LLC, Dillon, MT
- 2:50 – 3:05 p.m. *Break*
- 3:05 – 4:35 p.m. **Recent Federal Tax Developments**
John Werlhof, CPA
CliftonLarsonAllen LLP, Sacramento, CA
- 4:35 p.m. *Conference adjourns until Tuesday, October 26, 2021*

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DAY TWO: Tuesday, October 26, 2021

7:30 – 8:00 a.m.	<i>Registration Opens</i>
8:00 – 8:05 a.m.	<i>Welcome and Opening Remarks</i>
8:05 – 8:35 a.m.	Recent Federal Cases and Rulings Gwen Griffith, Attorney Tonkon Torp LLP, Portland, OR
8:35 – 9:35 a.m.	Business Succession Planning Frank Ciatto, JD Venable LLP, Washington D.C.
9:35 – 9:50 a.m.	<i>Break</i>
9:50 – 10:55 a.m.	Business Succession Planning (Continued) Frank Ciatto, JD Venable LLP, Washington D.C.
10:55 – 11:55 a.m.	Corporate Tax Issues in Recent Deals Alexander "Xander" Lee, JD, LLM (Taxation) Cooley LLP, Santa Monica, CA Patrick Sharma Cooley LLP, Santa Monica, CA
11:55 a.m. – 12:55 p.m.	<i>Lunch</i>
12:55 – 2:00 p.m.	Corporate Tax Issues in Recent Deals (Continued) Alexander "Xander" Lee, JD, LLM (Taxation) Cooley LLP, Santa Monica, CA Patrick Sharma Cooley LLP, Santa Monica, CA
2:00 – 3:00 p.m.	Ins and Outs of Retirement Distributions Frank Remund, CFP, EA SpringwaterWealth Management LLC, Portland, OR
3:00 – 3:15 p.m.	<i>Break</i>

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3:15 – 4:20 p.m.

Ins and Outs of Retirement Distributions (Continued)

Frank Remund, CFP, EA

SpringwaterWealth Management LLC, Portland, OR

4:20 p.m.

Closing Remarks and Conference Adjourns