

# Plan Your Schedule

Registration for Super Seminar includes access to all sessions. We encourage you to use this list to create a personalized itinerary. Simply mark the checkbox next to your preferred sessions, then print this list for easy reference during the event.

## Day 1

8:00 a.m. - 9:40 a.m.	<input type="checkbox"/>	<b>Tuesday, June 11</b> 8:00 a.m. - 9:40 a.m.	<b>Leveraging AI in Tax Notice Responses (S110A)</b> <i>Can you - should you - use an AI tool to help with responding to tax notices and preparing other submissions? (Speaker: John Sheeley, EA)</i>
	<input type="checkbox"/>	<b>Tuesday, June 11</b> 8:00 a.m. - 9:40 a.m.	<b>Passive Normal Activity (S110B)</b> <i>Dive into reporting and tracking passive activities. (Speaker: Shannon A. Hall, EA)</i>
	<input type="checkbox"/>	<b>Tuesday, June 11</b> 8:00 a.m. - 9:40 a.m.	<b>A Review of SECURE 2.0 (S110C)</b> <i>SECURE 2.0 through the years: an analysis of the law, reviewing we are now; and what is and will be changing. (Speaker: Alice Orzechowski, CPA, CMA, EA)</i>
10:00 a.m. - 11:40 a.m.	<input type="checkbox"/>	<b>Tuesday, June 11</b> 10:00 a.m. - 11:40 a.m.	<b>Exchange This (S120A)</b> <i>A practical, hands-on case study in how to properly report 1031 Exchanges with the IRS and CA FTB. (Speaker: Laura Strombom, EA, MBA, USTCP)</i>
	<input type="checkbox"/>	<b>Tuesday, June 11</b> 10:00 a.m. - 11:40 a.m.	<b>Social Media Tax Trends (S120B)</b> <i>TikTok isn't a substantial authority?... What's trending and how best to advise your clients while complying with ethical standards. (Speaker: Matt Metras, EA)</i>
	<input type="checkbox"/>	<b>Tuesday, June 11</b> 10:00 a.m. - 11:40 a.m.	<b>Accurate Reporting and Maximum Strategy Short-Term Rental (S120C)</b> <i>Passive or not? Schedule E or C? Explore the popular yet misunderstood short-term rental tax loophole. (Speaker: Natalie Kolodij, EA, CRETS)</i>
1:00 p.m. - 2:40 p.m.	<input type="checkbox"/>	<b>Tuesday, June 11</b> 1:00 p.m. - 2:40 p.m.	<b>Mastering the Tax Research Process: Analyzing Tax Authority (S130A)</b> <i>Citable sources, reasonable basis and substantial authority, oh my! How to recognize and read authoritative sources, plus a review of tax research standards. (Speaker: Thomas A. Gorczynski, EA, USTCP)</i>
	<input type="checkbox"/>	<b>Tuesday, June 11</b> 1:00 p.m. - 2:40 p.m.	<b>Business or Hobby (S130B)</b> <i>Review the nine factors the IRS uses to determine if a venture is a business or hobby, with interesting real examples. (Speaker: Alice Orzechowski, CPA, CMA, EA)</i>
	<input type="checkbox"/>	<b>Tuesday, June 11</b> 1:00 p.m. - 2:40 p.m.	<b>Employee Stock Options (S130C)</b> <i>Bolster your understanding of ESOs and RSUs, taught by the best. (Speaker: Karen Brosi, EA, CFP®)</i>
3:20 p.m. - 5:00 p.m.	<input type="checkbox"/>	<b>Tuesday, June 11</b> 3:20 p.m. - 5:00 p.m.	<b>Mastering the Tax Research Process: Practical Applications (S140A)</b> <i>Learn how to effectively use your tax research for your clients' benefit. (Speaker: Thomas A. Gorczynski, EA, USTCP)</i>
	<input type="checkbox"/>	<b>Tuesday, June 11</b> 3:20 p.m. - 5:00 p.m.	<b>Due Diligence and Unique Dependent Scenarios (S140B)</b> <i>Beyond the traditional nuclear family: who's claiming who, and how do you know they qualify? Due diligence process in your practice; how to prepare for audit. (Speaker: Brad Messner, MBA, CBSA, EA)</i>
	<input type="checkbox"/>	<b>Tuesday, June 11</b> 3:20 p.m. - 5:00 p.m.	<b>Business Dispositions: Corporations and Partnerships (S140C)</b> <i>How to plan for and handle the sale or closure of your client's business. (Speaker: Laura Strombom, EA, MBA, USTCP)</i>

# Day 2

8:00 a.m. - 9:40 a.m.

- Wednesday, June 12 8:00 a.m. - 9:40 a.m.** **2023 and New 2024 Individual Tax News (S210A)**  
*The latest updates for individuals. (Speaker: Jane Ryder, EA, CPA)*
- Wednesday, June 12 8:00 a.m. - 9:40 a.m.** **Multi-State Tax Issues for Remote Workers (S210B)**  
*Coast to coast - a virtual road trip through multi-state filing requirements and unusual state reporting issues. (Speaker: Shannon A. Hall, EA)*
- Wednesday, June 12 8:00 a.m. - 9:40 a.m.** **Life Cycle of a Revocable Living Trust (S210C)**  
*Tax IDs to tax forms, grantors to trustees - everything you need to know about the life cycle of RLTs. (Speaker: Alice Orzechowski, CPA, CMA, EA)*

10:00 a.m. - 11:40 a.m.

- Wednesday, June 12 10:00 a.m. - 11:40 a.m.** **2023 and New 2024 Business Tax Update (S220A)**  
*The latest updates for businesses. (Speaker: Jane Ryder, EA, CPA)*
- Wednesday, June 12 10:00 a.m. - 11:40 a.m.** **The Gig is Up: Handling Income in Unique Industries (S220B)**  
*Side gig or business? If you want to serve influencers, brand ambassadors, OnlyFans content creators, crypto investors or online gamblers, then this session is for you! (Speakers: Matt Metras, EA, and Brad Messner, EA)*
- Wednesday, June 12 10:00 a.m. - 11:40 a.m.** **20 More Questions About Trusts and Estates (S220C)**  
*Come learn what sets trusts and estates apart, although they share tax forms and other similar qualities. (Speaker: Claudia Hill, EA, MBA)*

1:00 p.m. - 2:40 p.m.

- Wednesday, June 12 1:00 p.m. - 5:00 p.m.** **California Tax Update - Part 1 of 4-hour session (S230A)**  
*Everything you need to know about what's new for 2024 at the CA FTB, EDD & CDFTA. (Speaker: Karen Brosi, EA, CFP®)*  
*Note: 4-hour session*
- Wednesday, June 12 1:00 p.m. - 2:40 p.m.** **Tax Stuff You Thought You Knew (S230B)**  
*Beyond the basics – come hear about interesting but often unnoticed details in recent tax laws. (Speaker: Ryan Reichert, EA, CFP®)*
- Wednesday, June 12 1:00 p.m. - 2:40 p.m.** **Employee Retention Credit Update (S230C)**  
*The latest details on ERC audits, withdrawals, and settlement options now that IRS has set its sights on fraudulent ERC claims. (Speaker: Lawrence Pon, EA, CPA, USTCP, CFP®)*

3:20 p.m. - 5:00 p.m.

- Wednesday, June 12 1:00 p.m. - 5:00 p.m.** **California Tax Update - Part 2 of 4-hour session (S230A)**  
*Everything you need to know about what's new for 2024 at the CA FTB, EDD & CDFTA. (Speaker: Karen Brosi, EA, CFP®)*  
*Note: 4-hour session*
- Wednesday, June 12 3:20 p.m. - 5:00 p.m.** **The 121 Exclusion: So Much More Than the 2/5-Year Rule (S240B)**  
*Tax pros can encounter unique situations when Sec. 121 is involved; this session will help you recognize them. (Speaker: Natalie Kolodij, EA, CRETS)*
- Wednesday, June 12 3:20 p.m. - 5:00 p.m.** **Weird Science: Ethics and Misuse of AI in Tax Practice (S240C)**  
*Responsible computing - when is it okay to use AI in the tax world and when is it not? (Speaker: John Sheeley, EA)*

## Day 3

8:00 a.m. - 9:40 a.m.

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|--------------------------|---------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> | <b>Thursday, June 13</b><br>8:00 a.m. - 9:40 a.m. | <b>Hot Tax Topics Q/A Panel (S310A)</b><br><i>A powerful expert panel covering hot topics such as digital assets, real estate, security and technology, and tax planning. (Panalists: Thomas A. Gorczynski, EA, USTCP; Natalie Kolodij, EA, CRETS; Brad Messner, MBA, CBSA, EA; and Matt Metras, EA)</i> |
| <input type="checkbox"/> | <b>Thursday, June 13</b><br>8:00 a.m. - 9:40 a.m. | <b>ITINs: Individual Taxpayer Identification Numbers (S310B)</b><br><i>ITINS - who needs them, how do they get them, and how you can help your clients. (Speaker: Lawrence Pon, EA, CPA, USTCP, CFP®)</i>                                                                                                |
| <input type="checkbox"/> | <b>Thursday, June 13</b><br>8:00 a.m. - 9:40 a.m. | <b>Successful Schedule C Audits (S310C)</b><br><i>Everything you need to know about how to handle a Schedule C audit - from documentation to interacting with the auditor to audit reconsiderations and appeals. (Speaker: Jane Ryder, EA, CPA)</i>                                                      |

10:00 a.m. - 11:40 a.m.

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| <input type="checkbox"/> | <b>Thursday, June 13</b><br>10:00 a.m. - 11:40 a.m. | <b>Preparing Problem Tax Returns (S320A)</b><br><i>Just because a client's return isn't perfect, doesn't mean you must disengage. How to handle those problem returns while maintaining a commitment to accuracy and ethics.(Speaker: Thomas A. Gorczynski, EA, USTCP)</i>          |
| <input type="checkbox"/> | <b>Thursday, June 13</b><br>10:00 a.m. - 11:40 a.m. | <b>Special Purpose Trusts: QPRTs and Special Needs Trusts (S320B)</b><br><i>What makes special needs trusts so special anyway? How to identify these trusts, what makes them so unique, and the special compliance rules that they must follow.(Speaker: Claudia Hill, EA, MBA)</i> |
| <input type="checkbox"/> | <b>Thursday, June 13</b><br>10:00 a.m. - 11:40 a.m. | <b>Partnership and S Corp Basis (S320C)</b><br><i>Learn how to easily calculate partnership and S Corp basis for your individual clients. (Speaker: Ryan Reichert, EA, CFP®)</i>                                                                                                    |

Note: Webinar events are included in registration (no additional cost) and occur after the live event.

July Webinars

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|--------------------------|------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> | <b>Wednesday, July 10</b><br>10:00 a.m. - 11:40 a.m. | <b>Tax Deferral: Installment Sales and Planning Opportunities (WEB1)</b><br><i>Pen-to-paper approach to Sec 453 and Form 6252 + special topics like how to apply Sec 453 as an exit strategy for partners and S Corp owners. (Speaker: Darryl Brown, EA, Ph.D.)</i>                                                               |
| <input type="checkbox"/> | <b>Thursday, July 11</b><br>10:00 a.m. - 11:40 a.m.  | <b>Schedule D: The Good, the Bad, and the Downright Ugly (WEB2)</b><br><i>Incorrect basis? Wash sale? Sec 1244 stock? 1099-K or 1099-S? Limited Partnership interest? Personal bad debts? Worthless stock? No problem! We'll show you how to how to report ALL of these correctly. (Speaker: Alice Orzechowski, CPA, CMA, EA)</i> |