

NYSSCPA SOUTHERN TIER CHAPTER TAXATION CONFERENCE

Seminars

Doubletree by Hilton Hotel Binghamton
October 26, 2022
8:15 am - 5:00 pm
Event Sponsor: NYSSCPA

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10:45 - 11:45 am

Speakers: Ryan M. Murphy, Peter K. Bradley, and Joshua Gmerek

Topic: Retirement Planning

Keeping up with statutory, regulatory, and sub-regulatory changes ranging from cybersecurity to required minimum distributions that affect retirement plans and individual retirement accounts (IRAs) is a continuing change for employers, participants, and plan providers. And more changes may be coming. The session will highlight recent developments affecting retirement plan and IRA benefits and operational compliance.

11:45 am - 12:40 pm

Speaker: Nathan W. G. Berti

Topic: Estate and Trust Planning

Because of possible upcoming federal legislative changes with respect to estate and trusts, planning in this area has become more important. In this session, attendees will learn how to identify estate tax planning opportunities and the importance of establishing and reviewing core estate planning documents (wills, revocable trusts, powers of attorney and health care directives) This session will also provide the latest New York developments in trusts and estates.

1:40 - 3:30 pm

Speakers: James M. Bandoblu Jr. and Joseph R. Rekrut

Attorneys

James Bandoblu Jr.
Nathan Berti
Peter Bradley
Joseph Endres
Ryan Murphy

Practices & Industries

Business Tax
Employee Benefits
State & Local Tax
Trusts & Estates



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Topic: Federal Tax Update

Update on various federal tax legislative and IRS procedural changes over the past year, and discussion of current IRS initiatives and areas of focus, along with practice points for navigating audits and other IRS controversy matters. This session will also cover the employee retention credit.

3:45 - 5:00 pm

Speaker: Joseph N. Endres

Topic: NYS Tax Update

New York State and New York City enacted numerous tax law changes and revenue-raising measures in response to the Covid-19 pandemic in the 2021-2022 budget legislation. In this webinar, we will cover recent changes across different tax types in New York and their impact on individuals and businesses. The session will also summarize recent tax cases, rulings and administrative releases in New York State and City and the status of various tax incentive programs.

[Register Here](#)