

SYRACUSE CHAPTER TAXATION CONFERENCE

Seminars

Embassy Suites – Syracuse Destiny
November 2, 2022
8:15 am - 5:00 pm
Event Sponsor: NYSSCPA

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8:50 - 10:30 am

Speakers: James M. Bandoblu and Joseph R. Rehurt

Topic: Federal Tax Update

Updates 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.

10:40 am - 12:00 pm

Speaker: Daniel P. Kelly

Topic: NYS Tax Update

The goal for this presentation is to provide an overview of key recent New York State tax changes and developments, along with a similar discussion of tax changes and developments in New York City. This presentation will cover and analyze key aspects and changes from New York's 2022 – 2023 Budget Bill and other tax-related legislation. We will also cover the New York City Pass Through Entity Tax and other hot-topic City tax issues we have been monitoring. We will address adjustments to New York's treatment and interpretation of Public Law 86-272, which follows similar developments around the United States, and discuss other New York tax issues that have arisen from the significant growth in telecommuting and remote work.

1:00 - 2:15 pm

Speaker: Andrew W. Wright

Topic: NYS Residency Issues

Attorneys

James Bandoblu Jr.
Nathan Berti
Peter Bradley
Joseph Endres
Daniel Kelly
Ryan Murphy
Andrew Wright

Practices & Industries

Business Tax
Sales & Use Tax
State & Local Tax

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New York's Tax Department continues to aggressively chase taxpayers who claim changes of residency. The last few years have seen a surge in moves—many spurred by Covid and the changes it brought to people's lives—from New York to low or no-tax jurisdictions. This webinar will focus on New York's residency rules, defending changes of residence in an audit, and addressing other personal income tax issues that arise in the context of residency audits—most notably in recent audits, the state tax implications around remote work.

2:15 - 3:05 pm

Speaker: Joseph N. Endres

Topic: Sales Tax Update

The goal of this course is to inform you about how and why NYS decides to audit certain companies. The NYS Tax Department has limited resources compared to the number of vendors operating in the state, so it tries to identify those candidates for audit that are not in compliance with the state's sales tax rules. Unfortunately, however, many compliant companies are picked up for audit because they are unwittingly engaging in activities that place them on the Tax Department's radar. This course will teach you the techniques NYS uses to find companies for audit, in the hopes that it will help compliant companies reduce their risk of audit. We will also review certain hot topics and new cases from the past year.

3:15 - 4:05 pm

Speaker: Nate W. G. Berti

Topic: Estate Tax Updates

This session will provide an update on estate and gift tax rules, including 2023 exemption updates and recent IRS guidance on RMDs from inherited IRAs. It will also provide a refresher on the estate tax alternate valuation rules, and a practical discussion on estate planning ideas in the current economic and political environments.

4:05 - 4:55 pm

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

Topic: Retirement Plan Developments

This segment will cover updates to the required minimum distribution rules, New York Secure Choice Savings program, cryptocurrency and ESG retirement plan developments, updated 5500 auditor standards, and miscellaneous retirement plan developments.

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