

2024 FLORIDA TAX RESIDENCY SERIES

Seminars

Palm Beach, Boca Raton, Sarasota, Naples, Florida
January 25, 2024 - March 7, 2024
Event Sponsor: Hodgson Russ LLP

January 25, 2024 - March 7, 2024
Palm Beach, Boca Raton, Sarasota, Naples, Florida

Who Should Attend: Individuals with dual residences, non-Florida residents, in-house tax counsel, accountants, tax managers, financial planners, insurance executives, high-net-worth individuals.

WEBINAR:

Thursday, March 7, 2024
10:00 a.m. - 12:00 p.m.
[CLICK HERE TO REGISTER.](#)

SEMINARS:

PALM BEACH

EAU Palm Beach
Thursday, January 25, 2024
3:00 - 5:00 p.m., Registration at 2:30 p.m.
110 S Ocean Blvd., Manalapan, FL 33462

BOCA RATON

Boca Raton Marriott
Friday, January 26, 2024
9:00 - 11:00 a.m.. Registration at 8:30 a.m.
5150 Town Center Cir., Boca Raton, FL 33486

SARASOTA

The Ritz-Carlton, Sarasota
Wednesday, February 14, 2024
3:00 - 5:00 p.m., Registration at 2:30 p.m.
1111 Ritz Carlton Dr., Sarasota FL 34236

Attorneys

Paul Baldwin Jr.
James Bandoblu Jr.
Jillian Brevorka
Ariele Doolittle
Joseph Endres
Daniel Kelly
Mark Klein
Timothy Noonan
Elizabeth Pascal
Andrew Wright

Practices & Industries

Tax

2024 FLORIDA TAX RESIDENCY SERIES

NAPLES

The Ritz- Carlton, Naples

Thursday, February 15, 2024

9:00 - 11:00 a.m., Registration at 8:30 a.m.

280 Vanderbilt Beach Rd., Naples, FL 34108

PALM BEACH

EAU Palm Beach

Friday, February 16, 2024

9:00 - 11:00 a.m. Registration at 8:30 a.m.

110 S Ocean Blvd., Manalapan, FL 33462

About the Event

Our speakers will provide latest information about compliance with state residency rules, which many have learned about the hard way. With good intentions, they did all the things they thought they needed to do in order to take up residency outside of their old state: they filed affidavits of domicile in the new state, registered their automobiles, obtained new driver's licenses, and registered to vote.

Unfortunately, most people aren't aware that a residency determination is based on more than mere declarations or physical presence in the state. In a residency case, the burden of proof is on the taxpayer. Even after you've moved out of one state, if you maintain living quarters in that state and visit from time to time, you may still be considered a resident of that state for tax purposes.

Are you thinking about moving to a new state? Have you already moved but retain significant connections with your prior state? If so, you may be a prime target for an audit. As the best offense is a good defense, this seminar may be right for you.

While primary emphasis will be on New York State's approach to a residency issues, the concepts to be discussed are applicable throughout the United States.

This seminar will provide you with information that may help you protect your assets and avoid pitfalls when moving out of a state or maintaining dual residences:

- How to Establish Residency in Florida for Tax Purposes
- New Residency and Nonresident Allocation Issues
- The Residency Audit Process
- Proactive Preparation for Nonresident Audits
- How a Florida Move will Impact Your Estate
- Florida Homestead Rules

2024 FLORIDA TAX RESIDENCY SERIES

- Protecting Your Assets and Trying to Reduce Tax on Transfers to Your Family

This seminar will also provide information on residency law for:

- Individuals With Dual Residences
- Non-Florida Residents
- In-House Tax Counsel
- Accountants and Tax Managers
- Financial Planners
- High-Net-Worth Individuals

All seminars are complimentary. Space is limited. Facilities are wheelchair accessible.

Register Here

If you have questions, contact us at hsocial@hodgsonruss.com.

This course is approved by the CFP Board for 2 hours continuing education credit, provider #3503; is approved by The Florida Bar for 2.5 hours of general CLER credit; New York State 2 hours of CPE and CLE credit available.

Hodgson Russ LLP is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org.