

Moss & Barnett's Upper Midwest CPA Firm Summit, in partnership with the Minnesota Society of CPAs (MNCPA) (Minneapolis, MN)

Fifth Street Towers Engage Conference Center, 150 South Fifth Street, Third Floor | 150 Tower, Minneapolis, MN 55402

May 2, 2024 | 9:00 a.m. - 4:00 p.m. (hosted happy hour to follow presentations)

Event Sponsor: Moss & Barnett | CPE Sponsor: Minnesota Society of CPAs (MNCPA)

We invite you to join **Taylor Sztainer** and **Charles Jones** from Moss & Barnett's nationally recognized **Professional Liability Defense Team** for Moss & Barnett's Upper Midwest CPA Summit (#CPASummit2024), in partnership with the Minnesota Society of CPAs (MNCPA).

- Taylor and Charles will share cutting-edge updates and insights on the management of legal exposures facing CPAs, including claims reporting and working with insurers.
- Moss & Barnett practice leaders in trusts and estates, elder law, and business formation will discuss changes in the law regarding new business formation requirements for professionals, employment law updates, and other issues of importance to CPAs.
- Independent members of the Minnesota Board of Accountancy will discuss current issues in regulation and enforcement.

This event is FREE! Parking, refreshments, and lunch provided. We invite you to stay for a hosted networking happy hour at the conclusion of the presentations.

Who Should Attend?

- CPA firm managing partners/CEOs/COOs
- CPA firm personnel with risk management responsibility
- CPAs interested in legal updates

CPE Credits

6 CPE credits (4 technical, 2 non-technical) will be offered (sponsored by the MNCPA)

Registration (MNCPA is managing registration for CPE purposes)

Register here for the May 2, 2024, Minneapolis Summit (registration closes April 24, 2024 | space is limited)

CPA Summit Schedule

Programming will run from 9:00 a.m.-4:00 p.m. with a networking happy hour at the conclusion of the presentations. Parking, refreshments, and lunch also provided. Please check back for updates.

8:30-9:00 a.m.

Registration, coffee and refreshments, sociability time

9:00-9:15 a.m.

Program Introduction (Charles Jones/Taylor Sztainer)

9:15-10:10a.m.

Minnesota Business Law Update Part 1 – Business Formation, Corporate Transparency Act/Beneficial Ownership Information (Peter Kaiser/Chris Stall/Alex Schoephoerster)

10:10-10:25 a.m.

Break

10:25-11:10 a.m.

Minnesota Business Update Part 2 – Employment/Litigation Trends (Taylor Sztainer/Naomi Nelson)

11:10-12:00 p.m.

Risk Management Updates (Taylor Sztainer/Charles Jones)

12:00-1:00 p.m.

Lunch (provided)

1:00-1:45 p.m.

Minnesota Trusts and Estate and Elder Law Update (Susie King/Nick Kaster/Mary Frances Price)

1:45-2:35 p.m.

Insurance (Charles Jones/Taylor Sztainer)

2:35-2:45 p.m.

Break

2:45-3:50 p.m.

The Board Speaks (The Minnesota Board of Accountancy/Taylor Sztainer/Charles Jones)



4:00-5:00 p.m.
Hosted Happy Hour

Your Moss & Barnett Hosts

Taylor D. Sztainer
612-877-5381
Taylor.Sztainer@lawmoss.com

Taylor co-chairs Moss & Barnett's Professional Liability team. She focuses on litigation, loss prevention, risk management, and serves as outside general counsel for her clients. She has litigated cases in federal and state courts throughout Minnesota and the United States focusing on professional liability claims against accountants and attorneys, trust and shareholder litigation, professional licensing, compliance, and ethics complaints/investigations, business and employment-related disputes, and real estate litigation. Taylor also represents CPAs in connection with disciplinary and enforcement actions before the Minnesota Board of Accountancy.

Charles E. Jones
612-877-5259
Charles.Jones@lawmoss.com

Charles co-chairs Moss & Barnett's Professional Liability team. He focuses his practice on defending lawyers and accountants against malpractice and other professional liability actions, and on assisting professionals with licensing and compliance issues. Charles also represents clients in commercial litigation. Charles has litigated cases in 35 jurisdictions across the United States involving claims against accountants, lawyers, enforcement of restrictive covenants, insurance law, harassment/discrimination, and other matters. Charles also advises CPAs and lawyers in risk management, compliance, and other issues.

Moss & Barnett Presenters

Peter J. Kaiser
612-877-5333
Peter.Kaiser@lawmoss.com

Peter is an experienced corporate lawyer who primarily works in the areas of emerging growth, alternative investing, and mergers and acquisitions.

Nicholas J. Kaster
612-877-5444
Nicholas.Kaster@lawmoss.com

Nick's practice focuses on estate planning for simple to complex estates as well as estate and trust



administration and business succession planning. He represents individuals and families in a variety of matters, including the preparation of wills, trusts, powers of attorney, health care directives, other estate planning documents, and estate and gift tax planning.

Susan A. King
612-877-5362
Susie.King@lawmoss.com

Susie's practice focuses on the areas of estate planning, probate and trust administration, and guardianship/conservatorship, Susie has experience covering a broad range of services, from the simple estate plan to the administration of complicated estate or trust matters. She also works closely with families to address issues of capacity and planning for disability or death.

Naomi M. Nelson
320-654-4585
Naomi.Nelson@lawmoss.com

Naomi is an experienced tax and business attorney assisting clients in structuring their business and personal ventures in a practical and tax-efficient manner. She provides strategic advice to clients in the areas of entity formation, buy-sell agreements, mergers and acquisitions, estate tax planning, and general business advice.

Mary Frances Price
612-877-5280
MaryFrances.Price@lawmoss.com

Mary Frances is an experienced VA Accredited Elder Law Attorney who focuses her practice on serving individuals and families who are establishing an estate plan, revising an existing estate plan, or dealing with the legal, medical, and financial impacts of aging, chronic illness, and disability. Her practice includes advising on Medicare, Medicaid, veterans' benefits, long-term care insurance, estate and tax planning, as well as asset protection for families and individuals with disability and long-term care expenses.

Alex R. Schoephoerster
320-654-4580
Alex.Schoephoerster@lawmoss.com

Alex provides strategic advice to clients in the areas of contract law, entity formation, fundraising, commercial transactions, estate planning and succession planning, real estate, mergers and acquisitions, buy-sell agreements, and general business practices. Alex also advises emerging companies and entrepreneurs on a suite of startup and growth matters.

Christopher D. Stall
612-877-5279
Chris.Stall@lawmoss.com

Chris has extensive experience with drafting and negotiating contracts, business restructurings, mergers and acquisitions, financings, strategic partnerships, distribution agreements, licenses, governance issues, exit strategies, and sales and recapitalizations. He works with clients in a spectrum of industries, including insurance, investment advisors, health care, manufacturing, distribution, pharmacy, hospitality, transportation, and accounting, as well as law, medical, and other professional service firms.

Minnesota Board of Accountancy Panel

Charles Selcer, MBA, CPA, CBMA

Chair of the Minnesota Board of Accountancy

Chuck Selcer has over 43 years of audit and business consulting experience. His areas of specialization include audits of nonprofit organizations, including single audits. He has extensive experience in statistical sampling in audit applications, organizational planning, and has served as a facilitator for strategic planning meetings. He currently teaches Professional Ethics classes for the Minnesota, North Dakota, and Wisconsin Society of CPAs and at colleges and universities nationwide.

Todd Lifson, CPA

Board Member of the Minnesota Board of Accountancy

Todd Lifson is a partner at Eisner Advisory Group LLC with more than 30 years of comprehensive business experience. He specializes in highly complex audit, tax, and merger acquisition engagements. He is also an advisor to many boards of clients, helping them navigate primarily financial matters and advising on operational items, succession issues, leadership changes, and growth strategies. Mr. Lifson has worked in the National Office of an international public accounting firm, with the Financial Accounting Standards Board's (FASB) Emerging Issues Task Force (EITF), and has served as a project manager for the development of a Securities and Exchange Commission (SEC) manual.

Furthermore, Todd has significant background with domestic and global enterprises and large privately held, mid-market, and publicly held (SEC) businesses, encompassing a broad range of industries and challenges faced, and has a particular specialization in large family-owned enterprises.

Allen Barr, Esq.

Assistant Attorney General, State of Minnesota

Allen Barr has served as an Assistant Attorney General for the State of Minnesota for nearly five years. He represents the Minnesota Board of Accountancy in its enforcement action proceedings brought pursuant to Minnesota Statutes 214.10 and 326A.08.

Parking

Parking for the Fifth Street Towers is available in both the 150 Tower (where Moss & Barnett is also located) and the 100 Tower depending on whether you approach from Second Avenue (one way heading south) or from Marquette Avenue (one way heading north). We will be handing out parking vouchers at the event for whichever tower you park in. Insert your original parking ticket that you pulled when you entered followed by the parking voucher we issue to you.

If you park in the 150 Tower, the skyway level stop on the parking ramp elevators will take you directly to the elevators serving the Engage Conference Center located on the third floor (Moss & Barnett is located on the 12th floor). If you park in the 100 Tower, you will need to walk from the Marquette Avenue side of the skyway level to the Second Avenue side to gain access to the elevators serving the Engage Conference Center (located on the third floor of the 150 Tower).

Attorneys

Charles E. Jones

Peter J. Kaiser

Nicholas J. Kaster

Susan A. King

Mary Frances Price

Alex R. Schoephoerster

Christopher D. Stall

Taylor D. Sztainer

Practice Areas

Business Law

Employment Law

Estate Planning and Wealth Preservation

Litigation

Professional Liability

