Super Seminar Sessions at a Glance

Note: all times are Pacific Time (PT)

Day 1: Tuesday, June 17, 2025

8:00 - 9:40 a.m.

- [ ] **Tax Stuff You Thought You Knew** | Ryan Reichert, EA, CFP®
  In this invigorating session, we will test the limits of your tax knowledge. Examine pitfalls in the law and consider tax strategies you may not have thought possible!
- [ ] **Foreign Information Form Reporting** | David Woods, EA, USTCP
  In today's mobile and global economy, we can at any time unexpectedly find ourselves with clients owning or operating assets and businesses outside the United States. This session will help navigate this potential minefield full of surprise penalties that start at $10,000.
- [ ] **Tax Forms Boot Camp: S Corporations (Part 1 of 2)** | Anita Monrroy, CPA, EA and Nichole Ralls, EA **RENO ONLY**
  This course offers 2 CE hours dedicated to theoretical instruction, followed by 2 CE hours of practical application through hands-on tax preparation using case studies and your own tax software. Participants are asked to bring their laptops loaded with their tax software to actively engage in case studies and practice the concepts learned.

10:00 - 11:40 a.m.

- [ ] **Tax Quest: The Ultimate Year-End Tax Planning Adventure** | David Hilliard, EA
  Embark on the Tax Quest! This epic adventure will lead you through the complex lands of tax planning where you'll master strategies to conquer the toughest challenges and secure your clients' financial future. Equip yourself with the tools and knowledge to maximize opportunities for growth and success!
- [ ] **Collection Client Guide** | Mark Seid, EA, CPA, USTCP
  Most IRS collection cases fit neatly into a few categories. Figuring out the right solution for each case just takes a few questions.
- [ ] **Tax Forms Boot Camp: S Corporations (Part 2 of 2)** | Anita Monrroy, CPA, EA and Nichole Ralls, EA **RENO ONLY**

1:00 - 2:40 p.m.

- [ ] **Time's Up: Statutes of Limitations** | Thomas Gorczynski, EA, USTCP
  When the clock runs out it's game over. This applies to taxes too. Every practitioner needs to understand statutes of limitation to competently represent clients for the win.
- [ ] **Form 4797 and Installment Sales** | Ryan Reichert, EA, CFP®
  The termination of a business means the disposition of all the assets. They may be sold, sent to the garbage, or taken home by the owner, all of which have tax consequences. We will also look at special rules that apply when assets are sold in an installment sale.
- [ ] **Tax Forms Boot Camp: Partnerships (Part 1 of 2)** | Anita Monrroy, CPA, EA and Nichole Ralls, EA **RENO ONLY**
  This course offers 2 hours dedicated to theoretical instruction followed by 2 hours of practical application using case studies and your own tax software. Participants are asked to bring their laptops loaded with their tax software to actively engage in case studies and practice the concepts learned.

3:20 - 5:00 p.m.

- [ ] **Fixing Stale Trusts: What's an Enrolled Agent to Do?** | Frank Acuña, Esq.
  How to assist clients who present old, outdated trusts which create more tax headaches than they cure!
- [ ] **Myths and Memes: Pitfalls of Social Media Tax Advice** | David Hilliard, EA
  Not all tax advice is created equal, especially on social media. Join this session for a fresh, fun look at viral tax tips, and pick up the lingo, to guide your clients with confidence and a little extra swagger.
- [ ] **Tax Forms Boot Camp: Partnerships (Part 2 of 2)** | Anita Monrroy, CPA, EA and Nichole Ralls, EA **RENO ONLY**

Super Seminar Sessions at a Glance

Day 2: Wednesday, June 18, 2025

8:00 - 9:40 a.m.

☐ **Real Estate Tax Planning Masterclass** | Natalie Kolodij, EA
Real Estate requires a good understanding of multiple areas of the tax code to unlock its fantastic benefits. This in-depth masterclass will cover the top strategies and planning points, as well as technical understanding and reporting elements.

☐ **S Corporation Basis and Form 7203** | Thomas Gorczynski, EA, USTCP
Is there a tax trap in your S corp clients' books? Learn how to avoid an artificially inflated tax bill on S corporation stock.

☐ **Tax Forms Boot Camp: Mastering Form 1040 (Part 1 of 2)** | Instructors TBA **RENO ONLY**
This course offers theoretical instruction, followed by practical application through hands-on tax preparation using case studies and your own tax software. Participants are asked to bring their laptops loaded with their tax software to actively engage in case studies and practice the concepts learned.

10:00 - 11:40 a.m.

☐ **Form 1120-S: S Corporation Tax Preparation** | Jane Ryder, EA, CPA
The most common business entity in the US by far is an S corporation. Expand your skills, and expand your practice, to include S corp return preparation for clients.

☐ **Employee Stock Options: Getting It Right** | Karen Brosi, EA, CFP®
Your complete guide to employee stock options. You will use the practical examples for planning and reporting for years to come.

☐ **Tax Forms Boot Camp: Mastering Form 1040 (Part 2 of 2) |** Instructors TBA **RENO ONLY**

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

☐ **How to Lose Your License** | Mark Seid, EA, CPA, USTCP
Some people open a paper to the obituaries; I open the Internal Revenue Bulletin (IRB) to Disciplinary Sanctions.

☐ **Foreign Tax Credit and Foreign Earned Income Exclusion** | David Woods, EA, USTCP
Is the foreign tax credit foreign to you? This session will teach preparers how to properly calculate foreign tax credits and the foreign earned income exclusion, the interaction between the two, and how to best navigate and optimize their usage.

☐ **Tax Forms Boot Camp: Advanced 1040 Scenarios (Part 1 of 2)** | Instructors TBA **RENO ONLY**
This course offers theoretical instruction, followed by practical application using case studies and your own tax software. Participants are asked to bring their laptops loaded with their tax software to actively engage in case studies and practice the concepts learned.

3:20 - 5:00 p.m.

☐ **Navigating the Future of Tax Research with AI** | John Sheeley, EA
Unlock the power of AI in tax research in this session designed for forward-thinking tax professionals! Learn to navigate cutting-edge tools, tackle real-world case studies, and future-proof your practice for a tech-driven industry.

☐ **California Business Non-Conformity** | Jane Ryder, EA, CPA
Many federal tax matters require different reporting for California purposes. Items such as business meals and entertainment, basis and depreciation for federal energy credits, R and D credits and more. Attend this course to understand current non-conformity for businesses.

☐ **Tax Forms Boot Camp: Advanced 1040 Scenarios (Part 2 of 2)** | Instructors TBA **RENO ONLY**

Super Seminar Sessions at a Glance

Day 3: Thursday, June 19, 2025

8:00 - 9:40 a.m.

☐ **California Tax Update (Part 1 of 2)** | Karen Brosi, EA, CFP®
Help your clients plan year-round with this mid-year update on California taxes. Get the latest news from FTB, EDD, BOE and CDTFA.

☐ **Digital Asset Taxation 101** | Matt Metras, EA
Taxation of digital assets can make a tax pro's head spin. Get the focus you need here.

☐ **IRS Presentation,** Speakers TBA **RENO ONLY**
Get the freshest news from the Internal Revenue Service.

10:00 - 11:40 a.m.

☐ **California Tax Update (Part 2 of 2)** | Karen Brosi, EA, CFP®

☐ **Advanced 121 Exclusions** | Natalie Kolodij, EA
The 121 Exclusion is one of the most common tax code sections with one of the widest realm of potential circumstances. With $500k on the line you can't afford to overlook the more advanced 121 Exclusion applications that could save your clients big time.

☐ **Generative AI Strategies for Tax Practitioners** | John Sheeley, EA **RENO ONLY**
Ready to bring your tax practice into the future? Attend this session to discover how AI can streamline tasks, enhance client service, and transform your workflow—making your job easier and your clients happier.

1:00 - 2:40 p.m.

☐ **Vulnerable Voices - Ethical Duties** | John Sheeley, EA
What are your ethical duties when clients can't speak for themselves? Designed to provide actionable insights for navigating ethical dilemmas with vulnerable clients, this is far from your typical dry ethics presentation!

☐ **Everything Roth IRAs** | Lawrence Pon, EA, CPA, USTCP, CFP®
Roth IRAs: Conversions, Mega-Back Door, Tax Calculations, and Recent Legislation. This is the ever popular Everything Roth IRA seminar where we cover Contributions, Conversions, Distributions, and Inheriting Roth IRAs.

☐ **2025 Digital Asset Tax Update** | Matt Metras, EA **RENO ONLY**
The field of cryptocurrency is constantly changing. Stay up to date or fall behind.

3:00 - 4:40 p.m.

☐ **Hot Topics Q&A** | Panelists TBA
A panel of nationally recognized tax experts will discuss the latest developments in taxation. Time will be allocated to answer pre-selected questions from Super Seminar attendees.

☐ **Disaster Tax Relief |** Speaker TBA
This session will provide an update on the latest legislation related to disaster tax relief.

☐ **Practice Management Roundtables** | Moderators TBA **RENO ONLY**
This session will provide a series of roundtable discussions on methods for improving profitability, workflow, growth, and retirement strategies.