



# 2024 Tax Expo

**January 10-11, 2024**

**NEW LOCATION**

**Shell Woodcreek Campus**

**150 N. Dairy Ashford Rd. Houston, TX**

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**Chamberlain Hrdlicka**  
Attorneys at Law

Welcome to the 2024 Tax Expo! Members of TXCPA Houston's Tax Committee designed this expo to provide you with valuable insights into technical, technology, and business leadership and development matters. Renowned professionals and experts in their respective domains have been carefully chosen to deliver information to keep you at the top of your game. You'll gain valuable knowledge you can use in your job. You'll make new connections, and reconnect with familiar friends. The expo's schedule allows dedicated time to interact with attendees and expo sponsors who can help you reach your goals.

This annual event offers up to 20 hours of CPE, but don't overlook valuable networking opportunities. You'll have the chance to connect with others through the Whova platforms and during dedicated breaks.

Take advantage of all the 2024 Tax Expo offers.

Discuss Industry Trends

Learn Best Practices

Discover Current Technologies

Explore Future Technology

Meet Current and Future Vendors

Receive up to 20 hours of Continuing Education Credit

We want to thank Shell for their use of the Woodcreek Campus. Please keep in mind this is a place of business and to stay within the classrooms that have been allotted for our use. Shell team members are available for questions if the need arises.

Sincerely,

**Devesh Pathak, CPA**

**Tax Expo Committee Chair.**

**Tax Expo Committee**

**and TXCPA Staff**



# Welcome to the 2024 Tax Expo!

**Both Days: 20 CPE Hours**

**Each Day: 10 CPE Hours**

## General Announcements

### Course Materials:

Please note, all session materials are available digitally only. Please print prior to attending if you would like paper copies.

The links to the materials are below. If you do not see a copy of a presentation or outline below, please note it is because we have not yet received the information from the speaker or the slides cannot be shared digitally. We will continue to post materials from our speakers as we receive them.

Not all sessions have materials on the below link at this time.

<https://www.tx.cpa/houston/2024-tax-expo-materials>



### Ethics:

Please note, all Ethics attendees must sign-up for Ethics at the check-in table on January 10th or January 11th. After checking-in, you will have an opportunity to sign-up for the Ethics session. This is the only session with an additional sign-up.

Reservations cannot be made beforehand. Ethics attendance is limited, so please be sure you sign-up when arriving Tuesday or Wednesday morning.

Due to Texas State Board of Public Accountancy's guidelines for ethics classes, there will be no late admissions to this session.





## **CPE Certificates:**

Certificates be emailed out at the end of each day with electronic evaluations. Please take a few minutes to provide your feedback; these surveys allow TXCPA Houston to plan better conferences. If you did not receive any confirmation emails leading up to this conference or if you do not receive an email with the evaluation and CPE certificate, please contact staff at [cpamail@txcpahouston.cpa](mailto:cpamail@txcpahouston.cpa) or [nlartigue@txcpahouston.cpa](mailto:nlartigue@txcpahouston.cpa).

*Due to the high number of email requests, we ask for patience in response time.*

The current program represents approximately 20 hours of CPE if you attend all sessions, including Early Bird and Sips and CPE. TSBPA rules state: the total CPE credits for a continuous program cannot exceed the actual time spent in the program. Continuous conferences and conventions, when individual segments are less than 50 minutes, should be combined and counted as one total program. For example, five 30-minute presentations would equal 150 minutes and should be counted as three CPE credits.

For every 50 minutes, you will receive 1 credit hour of CPE. For every 30 minutes, you will receive a half hour of credit.

**CPAs are responsible for reporting the correct amount of hours.**

**If Leaving Early: Please sign out at the registration table.**



## **Whova App:**

To access the agenda and speaker information, use the Whova app.

## **Sponsors:**

Sponsors can be found in rooms A180, A188, A190 and A198.

Please visit the sponsors' booths at the event! The more sponsors you visit and more times the QR code on your nametag is scanned, the higher your chance of winning a \$25 digital gift card.

## **Food:**

Breakfast, lunch, and snacks will be available for attendees on both days.

Snacks will be in the sponsors rooms.

Breakfast and lunch will be served outside Room B109

## **Tax Information:**

The IRS will allow 50% of all expenses for business meals/entertainment as deductible for tax purposes. The definition of meals includes continental breakfasts, refreshment breaks, lunches and receptions at professional seminars and conferences, including tax and gratuities. Cost of meals: \$150.00 per person per day.

## **Wi-Fi**

Please see the digital signage for the Wi-Fi password.

## **Reminders**

Smoking is not allowed in the classrooms or public areas.

Please silence your electronic devices so session speakers and attendees won't be disturbed.

Satisfactory temperatures are difficult to maintain. Always bring a sweater or jacket to ensure comfort.

## **Social Media**

Follow TXCPA Houston on LinkedIn and Facebook use #TXCPAHouston

Facebook - TXCPAHouston

LinkedIn - company/houston-cpa-society



# Day 1 - Tuesday- January 10, 2024

	Track 1 - B109	Track 2 - A166	Track 3 - A160
7:00 AM	Early Bird Session - Psychology of Wealth <i>Neetu V. Khiantani and Michael Mechler</i>	NO SCHEDULED EVENT	NO SCHEDULED EVENT
7:50 AM	Visit Sponsors, Make Connections, Enjoy Refreshments in Room A180, A188, A190, A198		
8:00 AM	Federal Income Tax Updates (technical) <i>Bruce McGovern</i>	ERC (technical) <i>Cedric Pitts</i>	The Corporate Transparency Act (technical) <i>Jack Najarian and Luz E. Villegas-Banuelos</i>
8:50 AM	Session to continue with no break		Visit Sponsors, Make Connections, Enjoy Refreshments
9:00 AM	Federal Income Tax Updates (technical) <i>Bruce McGovern</i>	ERC (technical) <i>Cedric Pitts</i>	Newton's Laws of Motion - Their Real Application to Executing Through Change in Your Firm (non-technical) <i>Will Hill</i>
9:50 AM	Visit Sponsors, Make Connections, Enjoy Refreshments in Room A180, A188, A190, A198		
10:00 AM	Federal Income Tax Updates (technical) <i>Bruce McGovern</i>	Reasonable Compensation for S Corp (technical) <i>Barbara Ashorn</i>	Does Your Business Hit the Mark? (non-technical) <i>Gregory Derderian</i>
10:50 AM	Session to continue with no break		Visit Sponsors, Make Connections, Enjoy Refreshments in Room A180, A188, A190, A198
11:00 AM	Federal Income Tax Updates (technical) <i>Bruce McGovern</i>	Cybersecurity and Your Role as a Tax Professional (technical) <i>Bill Odom</i>	Thought Leadership (non-technical) <i>Rhea Wessel</i>
11:50 AM	Visit Sponsors, Make Connections, Get Lunch		
12:30 PM	Profitable Alternative Risk Transfer (technical) <i>Jeremy Colombik</i>	NO SCHEDULED EVENT	NO SCHEDULED EVENT
1:20 PM	Visit Sponsors, Make Connections, Enjoy Refreshments in Room A180, A188, A190, A198		
1:30 PM	Financial Market Update (technical) <i>Chris Matlock</i>	Simple Online Automation (non-technical) <i>Alik Mock and Zac Neill</i>	Tax Controversy: Employee Retention Credit (ERC) Voluntary Disclosure Program, IRS Processing Moratorium, and IRS Audit and Appeals Update (technical) <i>Juan Vasquez, Jr and Tania Albuja</i>
2:20 PM	Visit Sponsors, Make Connections, Enjoy Refreshments in Room A180, A188, A190, A198		
2:30 PM	Statements on Standards for Tax Services (SSTS) (technical) <i>Gerald Schreiber, Jr and Henry Grzes</i>	The Evolving Landscape of Business Tax Credits: R&D, Section 174 Amortization, and Substantiation Best Practices <i>Taylor Melton</i>	Equity Compensation: Taxation and Planning (technical) <i>Wade Egmon</i>
3:20 PM	Visit Sponsors, Make Connections, Enjoy Refreshments in Room A180, A188, A190, A198		
3:40 PM	Current Tax Controversy Updates and Advanced Issues (technical) <i>Keith Cothroll</i>	NO SCHEDULED EVENT	Building the Highly Effective Tax Practice (non-technical) <i>Austin Tenette</i>
4:30 PM	Visit Sponsors, Make Connections, Enjoy Refreshments in Room A180, A188, A190, A198		
4:40 PM	Sips & CPE - The Impact of AI on Tax Professionals (technical) <i>Peter Purcell &amp; Todd Boutte</i>	NO SCHEDULED EVENT	NO SCHEDULED EVENT

# Day 2 - Wednesday - January 11, 2024

	Track 1 - B109	Track 2 - A166	Track 3 - A160
7:00 AM	Early Bird Session - Practice Valuation & Buyer/Seller Concerns (non technical) <i>Wade Holmes</i>	NO SCHEDULED EVENT	NO SCHEDULED EVENT
7:50 AM	Visit Sponsors, Make Connections, Enjoy Refreshments in Room A180, A188, A190, A198		
8:00 AM	Analysis and Automation Software Practice Owners and Tax Professionals Should Know (non-technical) <i>Lawrence Hackney</i>	NO SCHEDULED EVENT	NO SCHEDULED EVENT
8:50 AM	Visit Sponsors, Make Connections, Enjoy Refreshments		
9:00 AM	Partnerships in Distress: Debt/Equity Tax Overview (technical) <i>Michael Schindler</i>	Recalibrate Success: Begin with the End in Mind and Modern (technical) <i>Adam Bar; Amanda Bar</i>	Leverage Your Brand to Attract the Right Clients (non-technical) <i>Justin Lynch</i>
9:50 AM	Session to continue with no break		Visit Sponsors, Make Connections, Enjoy Refreshments in Room A180, A188, A190, A198
10:00 AM	Partnerships in Distress: Debt/Equity Tax Overview (technical) <i>Michael Schindler</i>	Recalibrate Success: Begin with the End in Mind and Modern (technical) <i>Adam Bar; Amanda Bar</i>	Qualified Opportunity Zones: Where Are We Now (technical) <i>Austin Carlson</i>
10:50 AM	Visit Sponsors, Make Connections, Get Lunch		
11:30 PM	2024 Legislative Landscape for Tax Practitioners (technical) <i>Anna Taylor and Jeff Kummer</i>	NO SCHEDULED EVENT	NO SCHEDULED EVENT
12:20 PM	Visit Sponsors, Make Connections, Enjoy Refreshments in Room A180, A188, A190, A198		
12:30 PM	Trends in Structuring Cross-Border Joint Ventures (technical) <i>Phyllis Guillory and Morgan Alleyn</i>	Recent Changes to the ACA: Navigating the New IRS E-filing Requirements (technical) <i>Monica Pritz</i>	Professional Ethics (technical) <i>Deanna Sullivan</i>
1:20 PM	Visit Sponsors, Make Connections, Enjoy Refreshments in Room A180, A188, A190, A198		
1:30 PM	Texas Tax Related Updates for Corporations (technical) <i>Anika Dickinson</i>	Appraisal Review Board (non-technical) <i>Tracie Zimmerman</i>	Professional Ethics (technical) <i>Deanna Sullivan</i>
2:20 PM	Visit Sponsors, Make Connections, Enjoy Refreshments in Room A180, A188, A190, A198		
2:30 PM	Lessons in Leadership (non-technical) <i>Steve Goodman</i>	Elevating ESG through Tax (technical) <i>Victor Sturgis</i>	Professional Ethics (technical) <i>Deanna Sullivan</i>
3:20 PM	Visit Sponsors, Make Connections, Enjoy Refreshments in Room A180, A188, A190, A198		
3:40 PM	Introduction to the Internal Revenue Manual (IRM) (technical) <i>Tyrone Taylor</i>	Managing US Tax Litigation and Controversy (technical) <i>Dan Sosna, Jenny Joy, Paul Masters, Bill Grout, Marian Briscoe</i>	Professional Ethics (technical) <i>Deanna Sullivan</i>
4:30 PM	Visit Sponsors, Make Connections, Enjoy Refreshments in Room A180, A188, A190, A198		
4:40 PM	Sips & CPE - 2024 Cyberthreat Update: You Will Be Breached (technical) <i>Chad Hiatt</i>	NO SCHEDULED EVENT	NO SCHEDULED EVENT

**For ethics, you must attend all 4 sessions to earn 4 Ethics CPE.**

# Sponsors

## Underwriter

[www.shell.com](http://www.shell.com)

We are a global group of energy and petrochemical companies with more than 90,000 employees in more than 70 countries. We use advanced technologies and take an innovative approach to help build a sustainable energy future.

## Diamond



[www.chamberlainlaw.com](http://www.chamberlainlaw.com)

Chamberlain Hrdlicka is a diversified, tax-focused law firm with attorneys providing value at the highest level of client service. We are a mid-market, multi-service firm with a nationally-leading tax practice. While we have grown over the past five decades to more than 150 attorneys with a wide variety of practice areas, personalized attention to our clients' needs remains a hallmark of our heritage. We have built our reputation working with established and upcoming businesses as well as entrepreneurs and individuals with sophisticated legal needs. Today, our tradition of personalized service continues to be valued by clients from the smallest start-up ventures to the largest multinational companies.

## Platinum



[www.goodmanfinancial.com](http://www.goodmanfinancial.com)

Since 1989, Goodman Financial Corporation has been an independent SEC registered investment adviser based in Houston, Texas. We are a Texas-owned, fee-only investment management and financial advisory firm that has no affiliation with any insurance company, bank, mutual fund or brokerage firm. Our independent model and high ethical standards focuses us on keeping our clients' goals as our top priority in all of the investment decisions that we make. Beyond our commitment to our clients, we are also committed to philanthropy and giving back to our community.



# Sponsors

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events

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our events

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