SCHEDULE FOR TXCPA PERMIAN BASIN CPE EXPO

DAY 1 - WEDNESDAY, OCTOBER 23, 2024

8:30 to 10:10 a.m.	**TXCPA GOVERNMENT AFFAIRS AND ADVOCACY UPDATE AND 2025 SESSION PREVIEW** *Speaker: Kenneth Besserman, Director of Government Relations and Special Counsel at Texas Society of CPAs* This presentation will focus on TXCPA's advocacy efforts, preview the 2025 legislative session, speak about national CPA pipeline initiatives, and promote how the TXCPA PAC works and how you can make a difference
10:20 a.m. to noon	**THE IRS IS BACK AT IT AGAIN. WHAT DOES THE NEW HIRING AND FUNDING MEAN FOR YOU AND YOUR CLIENTS?** *Speakers: Josh Ungerman, CPA, Partner at Meadows, Collier, Reed, Cousins, Crouch & Ungerman LLP* *Mary Wood, CPA, attorney at Meadows, Collier, Reed, Cousins, Crouch & Ungerman LLP* The IRS has significantly intensified its enforcement efforts in 2024, fueled by increased funding that has led to more civil examinations and criminal investigations. This course will explore key areas of IRS focus, including the Employee Retention Credit (ERC), partnerships, high-income taxpayers, and promoted transactions. Participants will gain an understanding of how the IRS is leveraging advanced examination techniques and artificial intelligence to enhance its enforcement capabilities. Additionally, the course will provide essential strategies for tax practitioners and their clients to effectively navigate IRS examinations, appeals and investigations.
Noon to 12:50 p.m.	**LUNCH**
1:00 to 2:40 p.m.	**ECONOMIC UPDATE** *Speaker: Karr Ingham, Owner, Economist at InghamEcon, LLC* Economist Karr Ingham offers an assessment of the Permian Basin general economy, the general economies of Midland and Odessa (and the combined Midland-Odessa metro area) as well as the Permian Basin oil & gas economy. During the session, Ingham will review the Midland-Odessa Regional Economic Index and the Texas Permian Basin Petroleum Index, and will also present various economic data on the broader Permian Basin region.
2:50 to 4:30 p.m.	**USING EXCEL TO PREPARE AND PRESENT ACCOUNTING ANALYTICS PART II** *Speaker: Jennifer Johnson, CPA, Associate Professor of Instruction at The University of Texas at Dallas* This course provides a foundational overview of using Excel for accounting and financial analysis. It covers essential Excel functions and techniques with a focus on analyzing financial data, and creating financial reports & visualizations.

SCHEDULE FOR TXCPA PERMIAN BASIN CPE EXPO

DAY 2 - THURSDAY, OCTOBER 24, 2024

8:30 to 10:10 a.m.	**VALUATION UPDATE - NEW DEVELOPMENTS IN THE TAX AND FINANCIAL REPORTING WORLDS** *Speakers: Robert Allen, CFA, ABV, Partner - Forensic, Litigation and Valuation Services (FLVS) at Whitley Penn* *Katie Johnston, CFA, ABV, CEIV, Managing Director at Whitley Penn FLVS* This session will provide an overview of notable Tax Court decisions and updated guidance/best practices for tax and financial reporting-related valuations.
10:20 a.m. to noon	**WHAT YOU NEED TO KNOW ABOUT WHAT YOU KNEW - MEGA DEALS, CONSOLIDATION & TRANSACTIONAL EVOLUTION** *Speakers: Jason Schumacher, Partner - Oil, Gas, Energy and Transactional Attorney at O'Melveny & Myers LLP* This presentation will offer a review of the recent mega deals in the oil and gas space and a discussion of novel transactional structures being used by upstream and midstream companies.
Noon to 12:50 p.m.	**LUNCH**
1:00 to 2:40 p.m.	**HOW TO LIVE A FULFILLING LIFE** *Speaker: Dana Garnett, CPA, Mediator, Conflict Resolution Specialist and Speaker at Mindful Strategy* Whether you're gearing up for tax season, dealing with a dilemma, or just needing to make sense of it all... stressful situations are part of life. And that's ok - as long as you know how to go with the flow and not burnout from the challenge. The good news is you already have what it takes to ride life's emotional waves and experience long term happiness. It just takes discovering it and you're on your way
2:50 to 4:30 p.m.	**LEADERSHIP: THE LEADER THAT PEOPLE FOLLOW** *Speaker: PJ Dunn, C.C.P., Founder and CEO of Dunn Coaching Dunn Consulting LLC* Explore key strategies for effective leadership, from communication and trust-building to inspiring action. Gain practical tools to lead with clarity, empathy, and purpose in guiding teams and driving change.

GET TO KNOW THE 2024 CPE EXPO SPEAKERS

KENNETH BESSERMAN

Director of Government Relations and Special Counsel at Texas Society of CPAs

Kenneth Besserman has more than 30 years of legal and government relations experience with trade associations, state government and in private practice. He He joined the Texas Society of CPAs in 2020 as the Director of Governmental Affairs and Special Counsel. In that role, Kenneth directs the TXCPA governmental affairs and legislative program. Working closely with TXCPA members, legislators, and the lobby, Kenneth helps advance and protect TXCPA and its members on issues relating to licensing, taxes, and business regulations.

Prior to joining TXCPA, Kenneth was the General Counsel to the Texas Restaurant Association and was responsible for all legal, regulatory, and government relations matters affecting the association and restaurant industry including employment law, tax law, alcohol regulation, hospitality law, administrative law, and health and safety issues.

Before to becoming General Counsel for the Texas Restaurant Association, Kenneth served as Assistant General Counsel with the Comptroller of Public Accounts and General Counsel and Chief of Staff for Texas State Senator Rodney Ellis. During his legal career, Kenneth's legal practice has focused on state policy issues, administrative law, legislative matters, state budget and fiscal issues, public finance, unclaimed property, and litigation.

Kenneth received a Bachelor of Arts from Tulane University in 1988; a Doctor of Jurisprudence from the University of Houston Law Center in 1991; and an LLM from the London School of Economics in 1995. In 2021 Kenneth became one of five attorneys in Texas to receive a legal specialization in Legislative and Campaign Law – the only such specialization in the nation.

JOSH UNGERMAN, CPA

Partner at Meadows, Collier, Reed, Cousins, Crouch & Ungerman LLP

Mr. Ungerman specializes in tax controversies in addition to tax, business, estate and charitable planning. He has been involved with both domestic and international tax disputes in the United States Tax Court, the United States District Courts, and the United States Circuit Courts. The tax matters in which Mr. Ungerman is involved are typically very complex from both a factual and legal perspective. These matters often require legal and accounting skills. Mr. Ungerman is also a Certified Public Accountant.

Mr. Ungerman has been quoted on tax and estate matters in Forbes, Bloomberg, The BNA Daily Tax Report, and Tax Analysts-Tax Notes. The Chambers USA Guide describes Mr. Ungerman as "Incredibly dedicated: He lives and breathes his client's problems," and further reports, "If I knew somebody in a difficult position with the IRS, I'd definitely call Josh." Chambers USA describes the firm as a boutique which "draws resounding praise for its 'fantastically capable litigators,' who have extensive tax and white-collar crime litigation experience and expertise," and "frequently advises on criminal, income, and estate and gift tax matters."

Mr. Ungerman is a frequent speaker on tax topics including exams, IRS estate tax strategies, tax shelter defense, recent tax legislation, IRS criminal tax investigation techniques, and state tax controversy issues, and was admitted to practice in Texas in 1990.

MARY WOOD, CPA

Attorney at Meadows, Collier, Reed, Cousins, Crouch & Ungerman LLP

Ms. Wood's practice concentrates on resolving federal and state tax controversies, and white collar crime such as securities, tax and bank fraud. She represents individuals, closely-held businesses, and large corporations in IRS audits, appeals, and litigation in the United States Tax Courts, Federal District Courts and United States Court of Federal Claims. Ms. Wood also represents taxpayers in disputes with the Texas Comptroller of Public Accounts and other state tax agencies. Ms. Wood represents individuals and entities in business disputes and lawsuits involving fraud, breach of contract, breach of fiduciary duty, deceptive trade practices act violations, non-compete violations, business torts, and other commercial disputes.

Prior to joining the firm in 2006, she was a litigation associate with a Texas law firm. She was admitted to practice in Texas in 2004.

KARR INGHAM

Owner, Economist at InghamEcon, LLC

Karr Ingham is a professional economist who lives and works in Amarillo, Texas. He is the owner of Ingham Economic Reporting, an economic analysis and research firm that specializes in the indexing and tracking of regional and metro area economies.

Mr. Ingham is a native of Stratford, Texas in the northern Texas Panhandle, and a 1979 graduate of Stratford High School. He attended Hardin-Simmons University in Abilene, Texas, and is a Magna Cum Laude BBA Economics graduate of West Texas A&M University in Canyon. He has graduate work in economics, primarily in the area of national macro-economic policy, and monetary theory and policy. He also taught undergraduate micro-economics at West Texas A&M for a short time (they were in a pinch!).

Ingham has a career history in agriculture broadcasting, public affairs and politics. He served as District Director and Legislative Aide to then U.S. Congressman Beau Boulter, and was the Congressman's principal liaison to the Panhandle and West Texas agriculture community. He also performed agriculture budget policy analysis for the Congressman, then a member of the House Budget Committee.

The regional metro analysis concept has been expanded to include regional energy production economies with the establishment of the Texas Permian Basin Petroleum Index, the Texas PetroIndex, a statewide index-based analysis of the state's energy production economy produced monthly for the Texas Alliance of Energy Producers. In addition, he also consults on economic and analytical policy matters and conducts various industry-related economic impact studies in Texas.

Ingham is member of the US Association for Energy Economics (USAEE) and holds his affiliation with the Houston chapter of that organization. He also serves on the natural gas supply and demand panel for the Independent Petroleum Association of American (IPAA) and is a frequent commentator in various local and statewide media outlets with regard to oil & gas prices and markets.

Mr. Ingham resides in Amarillo with his wife, Elizabeth, and two daughters – Allison and Gracie.

JENNIFER JOHNSON, CPA

Associate Professor of Instruction at The University of Texas at Dallas

Jennifer Johnson is a CPA licensed in the state of Texas. She owns and manages a client accounting practice utilizing technology and automation to help clients enact change through information. In addition, she is a Professor of Instruction at the University of Texas at Dallas where she teaches Accounting Systems, Data Analytics, QuickBooks Software, CPA Exam preparation, and Excel courses.

In 2024 Jennifer was named CPA of the Year by TXCPA Dallas and in 2017 she was named an Outstanding Accounting Educator by TXCPA. Jennifer co-authored six editions of Computerized Accounting with QuickBooks Online. Before joining the University of Texas at Dallas in 2009, Jennifer spent time in both public accounting and industry as an auditor with PwC, an Assistant Controller at a regional financial services firm, and a Finance Manager at Keurig Dr Pepper.

Jennifer holds both a BBA and MS in Accounting from Texas A&M University. Jennifer is a QuickBooks ProAdvisor, a Certified QuickBooks User and actively volunteers for the TXCPA and TXCPA Dallas. She served on the TXCPA Board of Directors in 2022-23, is the current chair of the Editorial Board, and is a member of the Strategic Planning Committee and the CPE Committee Chair for TXCPA Dallas.

ROBERT ALLEN, CFA, ABV

Partner - Forensic, Litigation and Valuation Services (FLVS) at Whitley Penn

Robert J. Allen, CFA, ABV has in-depth financial advisory and valuation experience with a focus on business valuation, intangible asset valuation, and value enhancement consulting. He has valued closely held businesses and partnerships in a variety of industries for a variety of purposes, including tax reporting, financial reporting, regulatory compliance, litigation support, management consulting, succession planning and transactional advisory support.

Robert has extensive experience with purchase price allocations (ASC 805), goodwill impairment testing (ASC 350), stock-based compensation/options (ASC 718/IRC 409a), intangible asset valuation, estate, and gift tax valuation, litigation and collaborative law matters, buy/sell agreement valuations, fairness opinions, solvency opinions, healthcare compensation studies, and transfer pricing studies. In addition, he has experience consulting with business owners on valuation and strategic planning issues, including the identification of value drivers and business risks to evaluate the impact on business value, identification of critical success factors and key performance indicators, the development of budgets and forecasts, and strategic bench marking.

KATIE JOHNSTON, CFA, ABV, CEIV

Managing Director at Whitley Penn FLVS

Katie Johnston has more than 16 years of experience leading and performing valuation analyses in regards to strategic consulting financial reporting, restructuring and tax purposes with a focus on the energy sector.

Prior to Whitley Penn, Katie worked with primarily upstream, midstream, and oilfield service clients and was the go-to valuation market and technical leader for the oil and gas industry. She also has extensive experience in developing substantial analytical procedures specific to client's business and industry to identify potential valuation issues. Additionally, Katie is involved with junior staff development, mentoring, and recruiting efforts.

JASON SCHUMACHER

Partner - Oil, Gas, Energy and Transactional Attorney at O'Melveny & Myers LLP

Jason Schumacher is co-chair of O'Melveny's Energy Industry Group. He is an upstream and midstream transactional and project attorney. Jason has closed over US$10 billion of transactions and projects.

DANA GARNETT, CPA

Mediator, Conflict Resolution Specialist and Speaker at Mindful Strategy

Dana Garnett is a Credentialed Advanced Mediator with the Texas Mediator Credentialing Association for court-ordered Civil & Family cases, a Conflict Resolution Strategist and CPA. Founder of The Mindful Strategy LLC she merges her Big Eight Accounting and International Fortune 100 experience with vast global life lessons. She empowers her clients by imparting real-time in-the-moment conflict resolution skills which enable them to successfully handle whatever life throws them. Key results include increased productivity, creative problem solving, greatly reduced stress, and improved business, family and social dynamics. Dana speaks to local, state and national business forums.

Dana’s career began as an auditor with Coopers & Lybrand in Dallas, Texas, followed by twenty-two years’ experience as an expat with diverse cultures across six continents, including with The Coca-Cola Company in International Internal Audit; and in Lagos, Nigeria and Brussels, Belgium in Facilities Management, Change Management, and as a Company executive trainer in finance and Targeted Selection® behavioral interviewing.

During her seven years in Bangkok, Thailand, Dana learned about mindfulness directly from Eastern philosophy teachings. First-hand experience to litigation that resulted in personal hardship and serious financial loss led her to the practice of Alternative Dispute Resolution, and a commitment to helping others avoid the pitfalls of unnecessary conflict.

Via Dana’s unique program Resolving Family & Business Conflict™, she helps business partners quickly resolve conflict when there are clashes over business strategy, operating values, generational conflict, rivalry, succession, business sale, divorce, estates, trusts and lawsuits. Dana’s distinct Mindful Strategy™ gets to the heart of and clears conflict fast with lasting change, so you can protect your business, your legacy, and bring your family peace.
You can learn more at www.danagarnett.net/v/a

Along with a Master of Science in Accountancy and a Bachelor of Music in Voice Performance from the University of North Texas, Dana holds a Master of Arts in Dispute Resolution and a Certificate in Executive Coaching from Southern Methodist University, and is a Certified Trainer with the HeartMath Institute® and The Connection Practice®.

She sits on the Board of Fulfilling the Vision, a nonprofit group that supports the arts in Dallas, Texas and beyond, through books and media that publicizes Dallas artists who are successful around the world.

PJ DUNN, C.C.P.

Founder and CEO of Dunn Coaching Dunn Consulting LLC

PJ Dunn C.C.P. is described as a "critical thinker with a heart for human flourishing." For the past fourteen years, PJ has inspired executives and transitioning professionals on how to polish their natural strengths while managing limitations.

As a Strengths Champion certified coach and certified coach practitioner through the Certified Coaching Federation, PJ has over 5,700 plus coaching hours and has delivered over 750 presentations to-date and continues to be an advocate for those who advocate. PJ coaches in house counsels, lawyers, from the associate level to the partner level, solo law firms to mid-size firms, C-level executive boards, sales teams, business owners and financial services industry executives who need traction when processing specific goals.

PJ is one of only a handful of non-lawyers chosen to advise the Dallas Association of Young Lawyers board of directors (2005). The DAYL has for the last seventeen years invited PJ to present at the DAYL's annual leadership retreat.

Numerous professional organizations and associations, with SMU's Dedman School of law leading the way, bring PJ in to present on ethics, professionalism, business development, networking, Implicit Bias, DE & I, strengths-based leadership, conflict resolution, productivity, mindfulness, Impostor Syndrome and self-care.