



Arizona Society of Certified
Public Accountants

4801 E. Washington St. Ste. 180
Phoenix, AZ 85034

(602) 252-4144
AZ toll free (888) 237-0700
Fax (602) 252-1511
www.ascpa.com

Phoenix Tax Workshop ADVISORY BOARD

Ira S. Feldman, CPA, AEP – **Co-Chairman**
Felco Business Services

Stephen J. Rodis, CPA – **Co-Chairman**
Wallace Plese + Dreher, LLP

Timothy Baughman
Northern Trust Bank of Arizona

James G. Busby, Jr., Esq., CPA
The Cavanagh Law Firm

Pat Derdenger, Esq.
Steptoe & Johnson, LLP

Robert H. Feldman, Esq.

Barry R. Friefield, CPA
REDW LLC

Alan Gold, CPA
Matthews, Gold, Kennedy & Snow, Inc.

Brian Hartstein, CLU
Economic Concepts, Inc.

Steven R. Herman, Esq.

Michael D. Lemme, CPA
Hunter Hagan & Co., Ltd.

Kelly C. Mooney, Esq.
Gallagher & Kennedy, PA

Thomas Murphy, Esq.
Murphy Law Firm

James F. Polese, Esq.
Gammage & Burnham, PLC

Jana K. Potenza, CPA
Potenza CPA, PC

Burgess J.W. Raby, Esq.
Raby Law Offices

William L. Raby, PhD, CPA
Director Emeritus

Gregory A. Robinson, Esq.
Farley, Robinson & Larsen

Thala Taperman Rolnick, CPA
Thala T. Rolnick, CPA, PLLC

Joyce A. Rolfes, JD, CPA, CFP
Five Peaks Financial Consulting, Inc.

Jack N. Rudel, Esq.
Jennings Strouss & Salmon, PLC

Jason M. Silver, Esq.
Silver Law PLC

Edward Zollars, CPA
Thomas & Zollars, Ltd.

Phoenix Tax Workshop

October 21, 2017

WORKSHOP FOCUS

CURRENT DEVELOPMENTS/ACA UPDATE/MARIJUANA/EMPLOYER LIFE INSURANCE

- A. DISCUSSION OF CURRENT DEVELOPMENTS.** Current tax issues, recent significant tax and business events, and practitioner comments will be reviewed and discussed.
IRA FELDMAN, CPA, CEP, CVA — *Co-Chairman, Phoenix Tax Workshop*
ira@aztax.org
- B. ANNUAL ACA (OBAMACARE) EXCHANGE UPDATE.** Our speaker will return to update us on next year's alternatives. Caution: You may not like his presentation, but it's not his fault.
DAVE PEROLIS — *The Argus Group*
dave@argusaz.com
- C. TAX IMPLICATIONS OF MEDICAL MARIJUANA.** Our speaker focuses his practice on this new billion dollar industry. But is it a tax nightmare?
JEFFREY TICE, CPA — *Jeffrey S. Tice CPAPC*
jstice@hotmail.com
- D. UNDERSTANDING EMPLOYER OWNED LIFE INSURANCE (EOLI) AND 101(j).** Our speakers, experts in the industry, will help to demystify tax implications.
BRIAN HARTSTEIN, MSFS, CLU, ChFC — *Bayntree Wealth Advisors*
bhartstein@bayntree.com
- CAROLINE MCKAY, JD** — *AVP & Counsel, John Hancock*
cmckay@jhancock.com

2017-18 Workshop Dates: Nov. 18 – Jan. 20 – Feb. 17

ASCPA...Leading Trusted Professionals