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## Phoenix Tax Workshop

June 20, 2020

### WORKSHOP FOCUS

#### CURRENT DEVELOPMENTS/PPP SBA PERSPECTIVE/PPP LEGAL ASPECTS/ PPP FORGIVENESS/BORROWING IN THE PPP ERA

- A. **DISCUSSION OF CURRENT DEVELOPMENTS.** Current tax issues, recent significant tax and business events and practitioner comments will be reviewed and discussed.

**Stephen J. Rodis, CPA**  
**Co-Chairman, Phoenix Tax Workshop**  
Wallace, Plese + Dreher, L.L.P.  
[steve@wpdcpa.com](mailto:steve@wpdcpa.com)

- B. **PAYCHECK PROTECTION PROGRAM.** The SBA Supervisory Lender Relations Specialist from the Arizona District will provide the SBA's perspective on the PPP loan program including rules and the EIDL status.

**Craig Jordan**  
SBA Supervisory Lender Relations Specialist, Arizona District  
[craig.jordan@sba.gov](mailto:craig.jordan@sba.gov)

- C. **PAYCHECK PROTECTION PROGRAM.** Our speaker will point out and explain the legal aspects of the PPP loan program so we can advise and consult with our clients to help them plan in these unprecedented and uncertain times.

**James P. O'Sullivan, Esquire**  
Tiffany & Bosco, P.A.  
[jpo@tblaw.com](mailto:jpo@tblaw.com)

- D. **PAYCHECK PROTECTION PROGRAM.** Our speaker will present an overview of the current status of forgiveness portion of the PPP loan program, including some financial reporting options.

**Mark R. Dreher, CPA**  
Wallace, Plese + Dreher, L.L.P.  
[MarkD@wpdcpa.com](mailto:MarkD@wpdcpa.com)

- E. **BANKING IN THE PAYCHECK PROTECTION PROGRAM ERA.** Our speaker will present information regarding the prospects of borrowing from lenders in the PPP loan era.

**Deven Mohnsam, Senior Vice President**  
MidFirst Bank  
[Deven.Mohnsam@midfirst.com](mailto:Deven.Mohnsam@midfirst.com)



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