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Phoenix Tax Workshop

June 17, 2017

WORKSHOP FOCUS

CURRENT DEVELOPMENTS/ESTATE PLANNING FOR CLOSELY HELD BUSINESS OWNERS/EXIT PLANNING FOR BUSINESSES/MRRA

- 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, LLP*
steve@wpdcpa.com
- B. ESTATE PLANNING FOR OWNERS OF CLOSELY HELD BUSINESSES.** Our speaker will walk us through the nuances of estate planning for S Corp and LLC owners.
STEVEN F. BUEL, CPA — *Wallace, Plese + Dreher, LLP*
steveb@wpdcpa.com
- C. EXIT PLANNING FOR BUSINESSES.** Our speaker will discuss the ins and outs of LOI's, purchase agreements, key provisions, and more.
JAMES P. O'SULLIVAN, ESQUIRE — *Tiffany & Bosco, P.A.*
jpo@tblaw.com
- D. THE NEW MRRA CONSTRUCTION SALES TAX REGIME.** Our Advisory Board member will explain what it is and how it works.
PAT DERDINGER, ESQUIRE— *Steptoe & Johnson, LLP*
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2017-18 Workshop Dates: Sept. 24 – Oct. 21 – Nov. 18

ASCPA...Leading Trusted Professionals