

Thursday-Friday, November 3 & 4, 2022

Live In-Person or Webcast attendance available

Pierson Auditorium Atterbury Student Success Center
UMKC Volker Campus, 5000 Holmes, Kansas City, MO 64110

Institute Co-Chairs

Jordan Bergkamp, *Husch Blackwell LLP* **Scott Bruce,** *MarksNelson, LLC*

In cooperation with the
University of Missouri-Kansas City School of Law Continuing Legal Education

CLE credit: MO 16.0 incl. 2.0 ethics & 1.0 elimination of bias
Credit pending in Kansas, Iowa, Nebraska, Illinois, Oklahoma, Minnesota
CPE credit 16.0 hours, CFP® Credit and Insurance credit pending

For speaker bios, agenda updates and complete conference info, visit HATIConference.org, call 816-235-1648 or email UMKCCLE@UMKC.EDU.

Thursday, November 3, 2022

CLE: MO 8.0 hours includes 2.0 hours ethics / Credit pending KS, IA, NE, IL, OK, MN CLE
CPE Credit 8.0 hours, CFP Credit and Insurance credit pending

8:00 AM	Webinar Access
8:25 AM	**WELCOME AND ANNOUNCEMENTS** Institute Chairpersons: **Jordan Bergkamp,** *Husch Blackwell LLP* **Scott Bruce,** *MarksNelson, LLC*
8:30-10:10 AM	**ETHICAL OBLIGATIONS FOR ATTORNEYS AND TAX PROFESSIONALS** **Prof. Steven M. Platau,** John H. Sykes College of Business, University of Tampa, Fl.
10:10-10:25 AM	BREAK
10:25-11:45 AM	**PARTNERSHIP TAX UPDATE** **Megan J. Whitlock,** Moss Adams, Dallas, Tx.
11:45-12:30 PM	LUNCH BREAK
12:30-1:15 PM	**TAX INCENTIVES** **Aaron Aversman,** EY, Houston, Tx.
1:15-2:15 PM	**STATE & LOCAL TAX UPDATE** **Sid Silhan,** EY, Atlanta, Ga.
2:15-2:30 pm	Break
2:30-4:30 pm	**ESTATE PLANNING UPDATE** **John R. Strohmeyer**, Strohmeyer Law PLLC, Houston, Tx.
4:30 PM	ADJOURN
4:30 PM	**NETWORKING SOCIAL FOR IN PERSON ATTENDEES**

Friday, November 4, 2022

CLE: MO 8.0 hours includes 1.0 hour elimination of bias / Credit pending KS, IA, NE, IL, OK, MN CLE
CPE Credit 8.0 hours, CFP Credit and Insurance credit pending

8:00 AM **WEBINAR ACCESS**

8:25 AM **Welcome and Announcements**
Institute Chairpersons:
Jordan Bergkamp, *Husch Blackwell LLP*
Scott Bruce, *MarksNelson, LLC*

8:30-9:20 AM **ECONOMIC UPDATE**
Jason Brown, Federal Reserve Bank of Kansas City, Mo.

9:20-10:20 AM **IRS CONTROVERSY**
Megan L. Brackney, Waller Lansden Dortch & Davis, LLP, Nashville, Tennessee

10:20-10:35 AM **Break**

10:35 AM-11:35 PM **CORPORATE TAX UPDATE**
Amie Kuntz, RubinBrown
Jason Uetrecht, Rubin Brown

11:35 AM-12:35 PM **INDIVIDUAL TAX UPDATE**
Amie Kuntz, RubinBrown
Jason Uetrecht, Rubin Brown

12:35 -1:15 PM **LUNCH BREAK**

1:15-2:15 PM **CRYPTO CURRENCY**
Prof. Del Wright, Jr., Professor of Law, UMKC School of Law, Kansas City, Mo.

2:15-3:15 PM **CYBER SECURITY**
Preston Bukaty, IntelePeer

3:15-3:30 PM **Break**

3:30-4:20 PM **ELIMINATION OF BIAS**
Dean Mikah K. Thompson, Assoc. Dean for Diversity, Equity and Inclusion
University of Missouri – Kansas City School of Law, Kansas City, Mo.

4:20 PM **Adjourn**

Institute co-chairs
Jordan Bergkamp * Husch Blackwell LLP
Scott Bruce * MarksNelson LLC

Speakers co-chairs
Brandon Oldham * Kirkland Woods & Martinsen LLP
Derek Love * KPMG LLP

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Ex Officio
Daniel J. McCarroll * *UMKC Law School*

CPA credit information Sponsor: UMKC/CLE Delivery Method: Live Lecture

A. Course Level: Basic
B. Course Objectives: to provide updates on important changes, developing concepts and decisions affecting tax law
C. No prerequisites or advance preparation
D. Delivery method: Group live
E. Recommended CPE credit to be awarded: 14 + 2 ethics
F. For more information regarding administrative policies such as complaints and refunds, contact 816-235-1648
G. UMKC/CLE is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National registry of CPE sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE sponsors through its web site: Learning market.org

REGISTRATION INFORMATION CODE KGH83

4 WAYS TO PRE-REGISTER:

1. **Online at HATIconference.org;**
2. **Mail completed registration form with payment to UMKC CLE, 4825 Troost Ave., Suite 211, Kansas City, MO 64110;**
3. **Phone (816) 235-1648;**
4. **Fax (816) 235-6552;**

Please enroll me in the 59th Annual Conference of the Heart of America Tax Institute, November 3 & 4, 2022

Please choose ATTENDANCE option:

☐ In Person ☐ Webcast

Please REGISTRATION options: ***Early Bird rates expire on Friday, Oct. 14, 2022***

☐ TWO-DAY Conference registration. Early bird pre-Oct. 17 $435 (after-Oct. 14 $490)

☐ ONE- DAY Conference registration. Early bird pre-Oct. 17 $285 (after -Oct. 14 $315)
☐ Thursday, Nov. 3 or ☐ Friday, Nov. 4

☐ HALF DAY Conference registration. Early bird pre-Oct. 17 $170 (after -Oct. 14 $245)
Thursday, Nov. 3 ☐ AM or ☐ PM
Friday, Nov. 4 ☐ AM or ☐ PM

☐ ONE-HOUR Elimination of Bias hour ONLY – Friday, Nov. 4, 3:30-4:20 PM $50 (after -Oct. 14 $75)

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