

68TH TAX INSTITUTE

Seminars

Buffalo Marriott Niagara
November 4, 2022
8:30 am - 5:00 pm
Event Sponsor: UB School of Management

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12:20 - 1:10 pm

Speaker: Amy P. Walters

Topic: Retirement Plans- Legal and Fiduciary Update

Extensions in required amendment deadlines, proposed regulations for required minimum distributions, ESG investing, cryptocurrency in retirement plans, and missing participants will be discussed. A fiduciary litigation update and DOL cybersecurity guidance will be provided as well as changes to EPCRS voluntary correction programs and possible legislation affecting retirement plans.

2:25 - 3:35 pm

Speaker: Daniel P. Kelly

Topic: State and Local Tax Update

The world of state and local taxation continues to evolve as taxing authorities implement new laws and update existing taxing regimes to address the changing business landscape across the United States. This session will address the tax challenges companies face doing business in multiple jurisdictions, including recent developments in the areas of nexus, sales and use tax and income and non-income-based taxes.

3:50 - 5:00 pm

Speaker: Joseph N. Endres

Topic: New York Tax Update

Enjoy a fast-paced discussion of "hot" New York State tax developments, including the 2022-2023 Budget Bill and other new legislation. In addition to a review of new cases, legislation and administrative rulings, this presentation will also discuss the

Attorneys

Joseph Endres
Daniel Kelly
Amy Walters

Practices & Industries

State & Local Tax

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State's extremely successful audit programs regarding residency, nonresident income allocation and sales tax. We will also discuss nexus issues for business, especially those selling over the internet and those allowing employees to telecommute.

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