

2023 SUMMER TAX SERIES

Seminars

605 Third Avenue, New York, New York
June 21 - August 2, 2023
8:30 - 10:15 a.m.
Event Sponsor: Hodgson Russ LLP

June 21 - August 2, 2023
605 Third Avenue, New York, New York

Registration [HERE](#)

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You are invited to our NYC offices, located at 605 Third Avenue, for our five-week Wednesday-morning series discussing important New York State, New York City, and multistate tax issues for 2023.

Hodgson Russ's experienced tax attorneys will provide insight into some of the most critical tax issues today: state and local income tax updates; residency hot topics; sales tax updates; estate, tax and M&A considerations; and an update of entity-level taxes. Our sessions are designed for financial professionals such as CPAs, CEOs, CFOs, COOs, corporate counsel, and tax and financial advisors.

Two hours of CPE credit per seminar session is available. CLE credit has been requested.

The cost is \$75 per session or \$325 for the full series (fully transferable).

Each session runs from 8:30 - 10:15 a.m. and is available in person or as a webinar broadcast.

Complimentary refreshments and an opportunity to meet the Hodgson Russ presenters are available for in-person attendees. Check-in begins at 8:00 am

In person attendees will need to show their ID upon arrival

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2023 Seminar Topics

Attorneys

Open Weaver Banks
Nathan Berti
Ariele Doolittle
Christopher Doyle
Joseph Endres
Debra Herman
Daniel Kelly
Mark Klein
Timothy Noonan
Elizabeth Pascal
K. Craig Reilly
Emma Savino
Valerie Stevens
Joseph Tantillo
Michael Van Wagnen
Andrew Wright

Practices & Industries

State & Local Tax



June 21 - New York and Other State and Local Income Tax Updates

This presentation will focus on the state and local tax developments over the last twelve months impacting income taxes applicable to individuals and corporations. The topics covered will focus on New York State and City cases, rulings, legislative and regulatory changes, and also on broader multistate themes like apportionment trends for sourcing the income of nonresident individual owners of pass-through entities and corporations, and economic nexus rules for corporate entities and pass-through entities (and their owners).

Christopher L. Doyle, K. Craig Reilly, Emma M. Savino

Register for the June 21 event [HERE](#)

June 28 - Residency

The New York State Department of Taxation and Finance has the most advanced and aggressive residency audit program in the nation. Auditors are constantly on the hunt for revenue by pursuing nonresidents for additional New York taxes. This seminar will help you understand the rules, requirements, and issues in working through New York's residency tests and associated personal income taxation. The panel will provide a practical review of the residency fundamentals for NY residents (and nonresidents), offer helpful insights gained from their personal experience working with clients into the audit process itself, and describe best practice strategies for achieving a successful outcome for your clients.

Andrew W. Wright, Ariele R. Doolittle, Joseph F. Tantillo, Michael Van Wagnen

Register for the June 28 event [HERE](#)

July 19 - Sales Tax Updates

This seminar will focus on hot sales tax topics, including: (i) sales tax in the digital age (software, data, digital security, and related nexus and sourcing issues); (ii) the Tax Department's recent problems with the "primary function test;" (iii) hot audit targets including artwork and collectibles; and (iv) tips for avoiding an audit (knowing what the Tax Department is looking at allows you to stay off its radar) and best practices for dealing with an audit.

Joseph N. Endres, Timothy P. Noonan, Mark S. Klein

Register for the July 19 event [HERE](#)

July 26 - Selling the Family Business – Estate, Tax & M&A Considerations

Deciding to sell a family business after years or decades of hard work is significant, and without adequate preparation the sales process can feel daunting for even the most seasoned operators. Join our experienced M&A, estates, and SALT practitioners to discuss preparation of the business for sale, what to expect in a sell-side M&A process, and examples of federal and New York tax planning strategies including transactions subject to Internal Revenue Code Section 1060 to maximize efficiency and sale proceeds.

Valerie E. Stevens, Daniel P. Kelly, Nathan W.G. Berti

Register for the July 26 event [HERE](#)

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August 2 - New York State and New York City Entity-Level Taxes: An Update

This seminar will provide the most recent updates on New York State and New York City Pass-Through Entity Taxes, including the PTET election; credits and addbacks; and other frequently asked questions. We will also review legislative and audit updates to New York City taxes, including Unincorporated Business Tax, General Corporation Tax, Business Corporation Tax, and Commercial Rent Tax. The session will highlight NYC audit initiatives, recent cases, and other post-pandemic changes that impact businesses operating in the City.

Elizabeth Pascal, Debra Silverman Herman, Open Weaver Banks

Register for the August 2 event [HERE](#)

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Two hours of CPE credit in Taxation per seminar session is available. CLE credit has been requested. No advance prerequisite or preparation is required. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit.