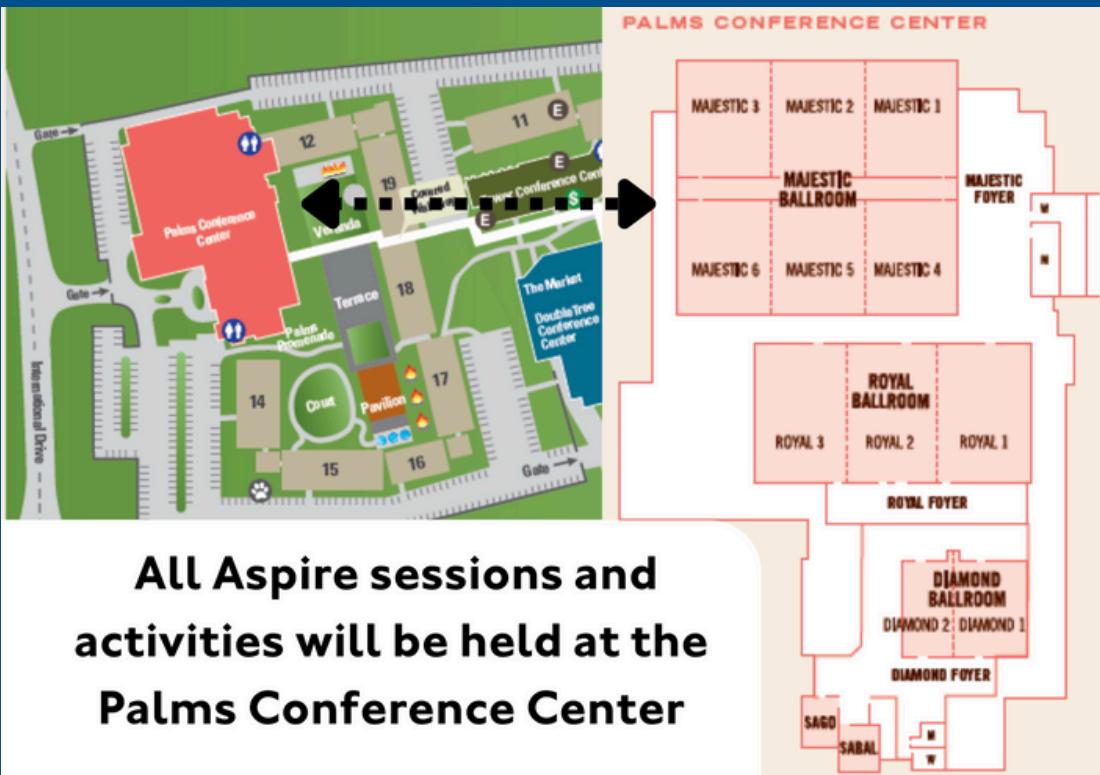


PRE-CONFERENCE - JUNE 24, 2024



2:00 to
5:00 PM

Onsite Registration
Majestic Ballroom foyer

9:30 AM
to
4:30 PM

NSA Board Meeting
Majestic Ballroom 2

9:00 AM
to
4:00 PM

ACAT Board Meeting
Majestic Ballroom 5

1:00 to
4:00 PM

NSA Foundation Board Meeting
Sabal Meeting room

DAY ONE - JUNE 25, 2024

General Session - Majestic Ballroom 1

NSA Expert Summit - Majestic Ballroom 4

8:00 AM	Networking Coffee and Registration in the Foyer	
8:30 AM	Opening Session Welcome - Joshua Caulfield	
9:00 AM	Welcome from NSA Board President Stephen Hill, CPA	
9:15 AM	Welcome from NSA Board Vice President Jense Creighton, EA	
9:30 AM	Introduction to Form 1041- Trusts & Estates with Jane Ryder, part 1 (1 CPE Credit)	NSA Summit Welcome & Launch / Impact of Technology, Especially AI, on the Profession
10:30 AM	Networking Break	
10:45 AM	FT Jones: Professional Liability and Cyber Protection Insurance with Joseph Barnard & Erin Singmaster (1 CPE Credit)	
12:00 PM	Lunch - Majestic Ballroom 6	
1:30 PM	Introduction to Form 1041- Trusts & Estates with Jane Ryder, part 2 (1 CPE Credit)	
2:30 PM	Networking Break	
2:45 PM	Form 7203 - How to Calculate Shareholder Basis with Mary Jane Hourani (2 Hours - 2 CPE Credits)	
3:35 PM	Break	
3:45 PM	Form 7203 - How to Calculate Shareholder Basis with Mary Jane Hourani (continued)	
5:00 PM	Happy Hour / Networking - Majestic Ballroom foyer	
5:30 PM	Welcome Dinner Reception - Majestic Ballroom 6	

DAY TWO - JUNE 26, 2024

General Session - Majestic Ballroom 1

NSA Expert Summit - Majestic Ballroom 4

8:00 AM

Networking Coffee

8:30 AM

Day Two Welcome

8:45 AM

Remarks from NSA Board Vice President Jense Creighton, EA

9:30 AM

Penalty Abatement with Jessie Seaman
(1 CPE Credit)

10:30 AM

Networking Break

10:45 AM

IRS E-Services for the Modern
Representation and Tax Practice with
Mark Dombrowski (1 CPE Credit)

**Curtailment and/or
Advancement of
Official
Requirements for
Tax Preparers**

12:00 PM

Lunch - Majestic Ballroom 6

1:30 PM

Succession Planning and How to Exit the Profession with Ken Portera
(2 Hours - 2 CPE Credits)

3:30 PM

Networking Break

3:45 PM

Elevate Your Research: Turn Knowledge into Action with CCH®
AnswerConnect AI-Enabled Solutions with Tammy Nickels (1 CPE Credit)

5:00 PM

Meet & Greet Reception - Majestic Ballroom foyer

5:30 PM

Dinner - Majestic Ballroom 6

DAY THREE - JUNE 27, 2024

General Session - Majestic Ballroom 1

NSA Expert Summit - Majestic Ballroom 4

8:00 AM

Networking Coffee

8:30 AM

Day Three Welcome

8:45 AM

Remarks from NSA Board Vice President Jense Creighton, EA

9:30 AM

Working with the IRS with Jessie
Seaman
(2 Hours - 2 CPE Credits)

**Making Public
Accounting
Part of the
Future**

10:30 AM

Networking Break

10:45 AM

Working with the IRS with Jessie
Seaman (continued)

12:00 PM

Lunch - Majestic Ballroom 6

1:30 PM

Ethics - Who Knew? with Mark Dombrowski
(2 Hours - 2 CPE Credits)

3:30 PM

Networking Break

3:45 PM

Closing session with NSA Board President Stephen Hill, CPA and NSA
Board Vice President Jense Creighton, EA

5:00 PM

Late Stayers Lounge

Dinner on your Own