



NAEA Winter Education Academy Agenda

November 30th – December 3rd, 2021

Scottsdale, AZ

Tuesday, November 30th

3:00 pm – 7:00 pm	Registration	Herberger Foyer West
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Wednesday, December 1st

7:00 am – 8:00 am	COFFEE/LIGHT BREAKFAST - Sponsored by Gallagher	Herberger 3
7:00 am – 3:00 pm	Registration	Herberger Foyer West
7:00 am – 4:40 pm	Exhibit Hall	Herberger 3
8:00 am – 9:40 am	Opening Keynote Federal Tax Update Speaker: Alan Pinck, EA & Kenneth Portera, EA	Herberger 5B
9:40 am – 10:00 am	AM BREAK	Herberger 3
10:00 am – 11:40am	L3.01.21: Advanced Exam - Part 1 Speaker: Alan Pinck, EA	Herberger 4A
10:00 am - 11:40am	Tax Track: Ethics of Working with Cash Based Businesses including Marijuana and Illegal Speaker: John Sheeley, EA	Herberger 5B
11:40 pm – 1:00 pm	LUNCH	On own
12:00pm – 1:00pm	Lunch and Learn – Sponsored by Tax Marketing Group Speaker: Justin Miller	Herberger 4A
1:00 pm – 2:40 pm	L3.01.21: Advanced Exam - Part 2 Speaker: Alan Pinck, EA	Herberger 4A
1:00 pm – 2:40 pm	Tax Track: Partnership Basis for Beginners Speaker: Jane Ryder, EA, CPA	Herberger 5B
2:40 pm – 3:00 pm	PM BREAK	Herberger 3
3:00 pm – 4:40 pm	L3.02.21: Advanced Exam Appeals Speaker: Alan Pinck, EA	Herberger 4A
3:00 pm – 4:40 pm	Tax Track: 6 Things You Didn't Know About 1099s Speaker: Thomas J. Williams, EA & Iris K. Palma, JD	Herberger 5B
5:00 pm – 6:30 pm	WELCOME RECEPTION - Sponsored by Taxfyle	Herberger 3



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Thursday, December 2nd

7:00 am – 8:00 am	COFFEE/LIGHT BREAKFAST – Sponsored by Landy Insurance	Herberger 3
7:00 am – 12:00 pm	Registration	Herberger Foyer West
7:00 am – 4:40 pm	Exhibit Hall	Herberger 3
8:00 am – 10:30 am	L3.03.21: Trust Fund Recovery Penalty Speaker: Marc Dombrowski, EA	Herberger 4A
10:30 am – 10:50 am	NTPI AM BREAK	Herberger 3
8:00 am – 9:40 am	IRC Section 121 & Personal Residence Speaker: A.J. Reynolds, EA	Herberger 5B
9:40 am – 10:00 am	TAX PREP AM BREAK	Herberger 3
10:50 am – 11:40 am	L3.04.21: Offer in Compromise – Part 1 Speaker: Marc Dombrowski, EA	Herberger 4A
10:00 am – 11:40 pm	Tax Track: When 199A and Reasonable Compensation Collide Speaker: Kevin Cross, MST, EA, CPA	Herberger 5B
11:40 pm – 1:00 pm	LUNCH	On own
1:00 pm – 2:40 pm	L3.04.21: Offer in Compromise – Part 2 Speaker: Marc Dombrowski, EA	Herberger 4A
1:00 pm – 2:40 pm	Tax Track: Depreciation from the Ground Up Speaker: Bill Nemeth, EA	Herberger 5B
2:40 pm – 3:00 pm	BREAK – PM	Herberger 3
3:00 pm – 4:40 pm	L3.05.21: Innocent Spouse Speaker: Marc Dombrowski, EA	Herberger 4A
3:00 pm – 4:40 pm	Tax Track: Foreign Tax Credits Speaker: Katrina Haynes, CPA	Herberger 5B
5:30 pm – 6:30 pm	S'mores Reception – Sponsored by AzSEA	Northern Sky Terrace



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December 3rd

7:00 am – 8:00 am	COFFEE/LIGHT BREAKFAST	Herberger 3
7:00 am – 10:00 am	Registration	Herberger Foyer West
7:00 am – 4:40 pm	Exhibit Hall	Herberger 3
8:00 am – 9:40 am	L3.06.21: Ethics (Level 3) - 2021 Speaker: Thomas A. Gorczynski, EA, USTCP	Herberger 4A
8:00 am – 9:40 am	Practice Growth Workshop - Marketing & Advertising Speaker: Kenneth Portera, EA & Tracy Ann Gordineer EA	Herberger 5B
9:40 am – 10:00 am	AM BREAK	Herberger 3
10:00 am – 11:40 am	L3.07.21: Tax Research and Resources Speaker: Thomas A. Gorczynski, EA, USTCP	Herberger 4A
10:00 am – 11:40 pm	Practice Growth Workshop - Starting & Exiting a Practice Speaker: Kenneth Portera, EA, Thomas J Williams EA, Iris Palma JD & Kevin Cross, CPA	Herberger 5B
11:40 pm – 1:00 pm	LUNCH	On own
1:00 pm – 2:40 pm	L3.08.21: Advanced Collection Appeals Speaker: Marc Dombrowski, EA	Herberger 4A
1:00 pm – 2:40 pm	Practice Growth Workshop - Networking & Work-Life Balance Speaker: Kenneth Portera, EA & Tracy Ann Gordineer EA	Herberger 5B
2:40 pm – 3:00 pm	PM BREAK	Herberger 3
3:00 pm – 4:40 pm	L3.09.21: Capstone Course (Level 3) Speaker: Marc Dombrowski, EA	Herberger 4A
3:00 pm – 4:40 pm	Practice Growth Workshop - Client Retention/Termination & Dealing with Mistakes Speakers: Kenneth Portera, EA, Thomas J Williams EA, Iris Palma JD, Jane Ryder EA & Kevin Cross, CPA	Herberger 5B
5:30 pm – 6:30 pm	NTPI Graduation & Awards Ceremony	Herberger 5B