



# A Day On Tax with McNees

November 1, 2024

Register here 

## AGENDA

### 7:30 a.m. – 8:00 a.m. - Breakfast and Registration

### 8:00 – 8:10 a.m. - Opening Remarks

A preview of the day's content and speakers.

### 8:10 – 9:00 a.m. - PA Property Tax Update

In this session, Paul Morcom will cover all the major issues in property tax assessments, including taxing jurisdiction appeals and upcoming county-wide reassessments.

### 9:00 – 9:50 a.m. - PA Sales & Use Tax Update

In this session, Sharon Paxton will discuss recent Pennsylvania sales and use tax developments and selected topics.

### 9:50 – 10:00 a.m. - Break

### 10:00 – 10:45 a.m. - PA Local Tax Update

In this session, Adam Koelsch will address current issues and trends surrounding the "nuisance taxes," such as business privilege tax and amusement tax.

### 10:45 – 11:15 a.m. - PA SALT Update

In this session, Ryan Gonder will discuss all the recent PA SALT litigation at Commonwealth Court and the PA Supreme Court along with changes to the Tax Code based on the 2024/2025 Budget.

### 11:15 a.m. – 12:00 p.m. - Tax Exempt Organizations - M&A

In this session, Alex Ahlbrandt is going to discuss the increasing rules and regulations governing tax-exempt organizations merging with other tax-exempt organizations.

### 12:00 – 1:00 p.m. - Lunch/Speakers from PA Appeal Agencies

Speakers to include: Ryan Froman – Chair of Board of Appeals, Tom Watson – Secretary of Board of Finance and Revenue and Todd Faciana from the Office of Attorney General's Tax Litigation Section.

### 1:00 – 2:00 p.m. - White Collar/Criminal Tax Update

McNees White Collar Group attorney and former federal prosecutor Jim Clancy will be joined by former IRS-CI Assistant Special Agent-in-Charge Tom Bishop to provide insight on the latest IRS criminal enforcement priorities.

### 2:00 – 2:35 p.m. - Estate Planning Update

In this session, Andrew Rusniak will cover the current tax laws associated with gift and estate planning, including the annual gift exclusions and the lifetime gift, estate tax exemption amounts, and current planning techniques.

### 2:35 – 3:10 p.m. - ERISA/Employee Benefits Update

In this session, Renee Lieux will address the recent Secure 2.0 changes and other changes affecting your employee benefit plans.

### 3:10 – 3:20 p.m. - Break

### 3:20 – 4:00 p.m. - Federal Income Tax Update

In this session, Justin Abodalo will discuss various topics including: *Moore v. US* and the Supreme Court's analysis upholding the constitutionality of the Tax Cuts and Jobs Act; Basics on the Corporate Transparency Act and the constitutional challenges made against it in *NSBA v. Yellen*; the implications of *Huffman v. Commissioner* where the Tax Court upheld the taxpayer's allocation of personal goodwill; statute of limitations implications arising from the Tax Court's decision in *Meyer v. Commissioner*, where the IRS recasted a transaction that occurred in the year 2000; SCOTUS' overturning of the Chevron doctrine in *Loper Bright Enterprises v. Raimondo* and what that means for Treasury Regulations going forward; various PLRs and Revenue Procedures issued throughout the year.

### 4:00 – 4:30 p.m. - PA Realty Transfer Tax Update

In this session, David Evenhuis will delve into the exemptions from Realty Transfer Tax and various pitfalls that practitioners encounter when transferring real property in Pennsylvania.

If you have any questions,  
please contact

**Karen Swaringen**, Events Administrator at  
[kswaringen@mcneeslaw.com](mailto:kswaringen@mcneeslaw.com)

**REGISTRATION FEE**  
**\$149.00**

(Fee includes continental breakfast, lunch,  
cocktail hour and 8.0 CPE or CLE credits.)

**No Shows are Ineligible for Refunds**

[REGISTER ONLINE HERE](#)

*Please join us for a social and networking  
hour at the conclusion of the seminar.*

## The McNees SALT Group

McNees Wallace & Nurick LLC has served the legal needs of business and industry since 1935. Collectively, the members of the McNees State and Local Tax (SALT) group bring decades of experience in dealing with state and local taxes. The SALT group assists businesses, trade associations and non-profit entities in negotiating tax rulings, dealing with auditors, drafting and advocating for tax code amendments and obtaining tax exemptions.