

OHIO CHAMBER OF COMMERCE
2023 BUSINESS TAX CONFERENCE
HYATT REGENCY COLUMBUS - AUGUST 23-24, 2023

WEDNESDAY, AUGUST 23

7:30 am – Registration Opens & Welcome Breakfast

8:20 am – Conference Welcome & Program Overview

- *Eleanor Palmer Bailey, AVP & Associate General Counsel, Nationwide Insurance Co.*

8:30 am – Income Tax Update – Developments in Federal & State Taxes Impacting Ohio

- *Thomas M. Zaino, Founder & Managing Member, Zaino Hall & Farrin, LLC*
- *Sara Goldhardt, Director, State & Local Tax Services, GBQ*
- *Kelvin Lawrence, Partner, Dinsmore & Shohl, LLP*

9:30 am – Midmorning Email and Refreshment Break

9:45 am – Economic Development Update – IRA and IJA and Ohio Programs to Benefit Investment & Encourage New Technologies

- *Scott Ziance, Partner, Vorys LLP*
- *Paul Naumoff, EY Global Co-Leader – Sustainability and ESG Tax*
- *Representative from JobsOhio*

11 am – Ohio Sales Tax Update Including Significant Cases and New Legislation

- *Ted Bernert, Partner, BakerHostetler LLP*
- *Laura Stanley, Sales Tax Counsel, Ohio Department of Taxation*
- *Mark Loyd, Partner & Co-Leader, Tax National Practice Group, Dentons LLP*

12:15 pm – Luncheon

12:30 pm – News from Washington – Pending Tax Legislation and an Economic Outlook as the US Government Fiscal Year Ends

- *John Traub, Managing Principal, Tax Policy Group, Deloitte*

1:45 pm – 3 Interactive & Concurrent Workshops

Workshop A: Ohio Sales & Use Tax - In-depth Review of Major Developments and Audit Policies

- *Ted Bernert, Partner, BakerHostetler LLP*
- *Alex Fant, Ohio Department of Taxation*
- *Steven Dimengo, Managing Partner, Buckingham LLC*

Workshop B: Tax Treatment of Nonprofit entities – What Taxes are Owed? The Panel will examine several scenarios to help tax advisors plan

- *Holly Gross, Associate, Benesch LLP*
- *Matt Stamp, Director, State & Local Tax Services, GBQ*
- *Justin Cook, Partner, Bricker Graydon LLP*

Workshop C: Tax Considerations in a Merger or Acquisition

- *Brian Sullivan – Tax Managing Director, Deloitte Tax LLP*
- *Joel Pangborn IV, CSX Corp.*
- *Kelsey Keween – Tax Manager, Hexion, Inc.*
- *Chris Tassone, Associate, Taft Law*

2:45 pm – Afternoon Refreshment Break

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WEDNESDAY, AUGUST 23 – CONTINUED

3:00 pm – 3 Interactive & Concurrent Workshops

Workshop D: Real Property- Update on Cases, Valuation and Legislation

- *Nicholas Ray, Partner, Vorys LLP*
- *Andrew Winkel, Ohio Department of Taxation*
- *Randy Stack, Director, DMA*
- *Adam Seeley, Associate Counsel, Bricker Graydon*

Workshop E: PTE/PIT – Update on Taxation of Pass-Throughs and Personal Income Tax

- *Stephen Hall, Member, Zaino Hall & Farrin LLC*
- *Courtney Clark, Partner, Multistate Tax Services, Deloitte*
- *Stephen Palmer, Principal, Plante Moran*
- *Greg Saul, Director of Tax Policy, Ohio Society of CPAs*

Workshop F: Siting Considerations – CAT Nap and State Siting Controversies

- *Debora McGraw, Member, Zaino Hall & Ferrin LLC*
- *Richard Fry, Partner, Buckingham LLC*
- *Sarah Wise, Ohio Department of Taxation*
- *Jeremy Hayden, Partner, Taft Law*

4:45 pm – Reception Begins in Grand Ballroom

5:00 pm – Experts Roundtable with Special Guests Tax Commissioner Patricia Harris and House Ways & Means Chairman Rep. Bill Roemer.

- *Sarah O’Leary, Chief Counsel, Ohio Department of Taxation*
- *Steven Dimengo, Managing Partner, Buckingham LLC*
- *Adam Garn, Principal, Plante Moran*
- *Ted Bernert, Partner, BakerHostetler LLP*

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THURSDAY, AUGUST 24

7:45 am – Ethics & Professionalism for State Tax Professionals – Top Ethical Dilemmas

9:00 am – Nationwide State & Local Tax (SALT) Update

- *Doug Lindholm, President & Executive Director, Council on State Taxation*
- *David Ebersole, Counsel, BakerHostetler LLP*
- *David Perry, Senior Manager, KPMG*

10:30 am – Midmorning Email and Refreshment Break

10:45 am – Federal Tax Update

- *David Adler, Firm Director, Deloitte Tax LLP*
- *Adam Gray, Manager Tax, Scotts Miracle-Gro Company*
- *Stephen Palmer, Principal, Plante Moran*

12:00 pm – Luncheon with Speaker: Building an Effective Intergenerational Tax Team

- *Kitty Kollmeyer, Owner of Kitty Kollmeyer Group, PCC*

1:30 pm – 3 Interactive & Concurrent Workshops

Workshop G: Midwest Regional Tax Update:

- *Stephanie Bruns, Senior Managing Associate, Dentons*
- *Kelvin Lawrence, Partner, Dinsmore & Shohl, LLP*
- *Matt Tober, Tax Leader, Owens Corning*

Workshop H: Update on Tax Credits for R&D Expenditures

- *Dan Clifford, Vice President, Clarus R+D*
- *Adam Gray, Manager Tax, Scotts Miracle-Gro Company*
- *Matt Culp, Tax Senior Manager, Deloitte Tax LLP*

Workshop I: Tax Technology – Lessons on Technology Integration

- *Denise Vincent, Director of Tax, Nationwide Insurance*
- *Amy Thomas Laub, Director Corporate Tax, Nationwide Insurance*
- *Steve Boston, Director, Information Technology Services, GBQ*

2:30 pm – Refreshment Break

2:45 pm – 3 Interactive & Concurrent Workshops

Workshop J: Taxation of Digital Goods – Federal, State and International Updates

- *Adam Bering, Credits & Incentives Leader, EY*
- *David Ebersole, Counsel, BakerHostetler LLP*
- *Fred Nicely, Senior Tax Counsel, Council on State Taxation*

Workshop K: Department of Taxation Changes – Technologies, Personnel, and Other News

- *Sarah O’Leary, Chief Counsel, Ohio Department of Taxation*
- *Patricia Harris, Tax Commissioner*
- *Matt Chafin, Deputy Tax Commissioner*

Workshop L: Municipal Tax Update

- *Tom Zaino, Founding Member, Zaino Hall & Ferrin LLC*
- *Amy Arrighi, Executive Director of Regional Income Tax Agency*
- *Julie Corrigan, Senior Manager, Plante Moran*

4:00 pm – Ethical Considerations for Settlements and Negotiations