

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*
- *Andrew Deye, VP of Strategy, 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*
- *Bailey Reese, Partner, Dentons*

**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

- Lauren Johnson, Counsel, Vorys LLP
- Andrew Winkel, Ohio Department of Taxation
- Chris Condon VP of Property Tax DMA
- Bill Faulkner, VP of Property Tax, 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
- Julie Corrigan, Senior Manager, Plante Moran
- Greg Saul, Director of Tax Policy, Ohio Society of CPAs

#### Workshop F: Situsing Considerations – CAT Nap and State Situsing 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

## THURSDAY, AUGUST 24

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

- Bailey Roese, Partner, Dentons
- Stephanie Bruns, Senior Managing Associate, Dentons

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

- Randy Stack, Director, DMA
- 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

- Greg Rosko, Partner, Deloitte Tax LLP
- Adam Gray, Manager Tax, Scotts Miracle-Gro Company
- Don Stanovcak, Principal, Plante Moran

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

- Kitty Kollmeyer, Owner of Kitty Kollmeyer Group, PCC

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## THURSDAY, AUGUST 24 - CONTINUED

### 1:30 pm – 3 Interactive & Concurrent Workshops

#### **Workshop G: Midwest Regional Tax Update:**

- *Mark Loyd, Partner & Co-Leader, Tax National Practice Group, Dentons*
- *Kelvin Lawrence, Partner, Dinsmore & Shohl, LLP*
- *Matt Tober, Tax Leader, Owens Corning*

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

- *Monika Diehl, Divisional VP Tax, Clarus R+D*
- *Adam Gray, Manager Tax, Scotts Miracle-Gro Company*
- *Aubrey Markota, 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**

- *Chris Futscher, Managing Director Indirect Taxes, 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**

- *David Kall, Managing Member, McDonalds Hopkins*
- *Sarah O'Leary, Deputy Tax Commissioner & 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*
- *Stephen Palmer, Principal, Plante Moran*

### 4:00 pm – Ethical Considerations for Settlements and Negotiations

- *Richik Sarkar, Partner, Dinsmore & Shohl LLP*