



**OHIO CHAMBER  
OF COMMERCE**

## **2025 Ohio Tax Conference**

**August 13-14, 2025 at the Hilton Easton, Columbus, OH**

### **Wednesday, August 13, 2025**

7:30-8:30 am – Registration Opens & Welcome Breakfast

8:30-8:40 am – Conference Welcome & Program Overview

8:45-9:45 am – General Tax Update

- Income Tax: Sara Goldhart, GBQ
- Sales Tax: Steve Dimengo, Buckingham
- CAT: Tom Zaino, ZHF

9:45-10:00 am – Networking & Email Break

10:00-11:30 am – 4 Interactive & Concurrent Workshops

- Workshop A: Structuring Your Corporate Reorganization to Minimize Tax Consequences
  - Seth Moody, Plante Moran
  - Jeremy Hayden, Taft
  - Jeff Monsman, GBQ
  - Joel Pangborn, CSX
  - Dave Pryzbojewski, Deloitte
- Workshop B: AI and other Technology Impact on Tax Offices
  - Stephen Palmer, Plante Moran
  - Corporate Industry member pending
- Workshop C: Sourcing Receipts and Sales – Case and Legislative Update for Situsing
  - Justin Cook, Partner, Taft
  - Charles Sulak, Tax Director, McLane Company
  - Panelist pending
  - Kyra Horvath, CAT Division Counsel, Ohio Department of Taxation
- Workshop D: Important Topics in Real and Utility Property Tax Valuation
  - Robert Maier, ZHF
  - Rick Shapiro, AEP
  - Brian Yungfleisch, Director of Indirect Taxes, NiSource
  - Sara Caldwell, PIT & PUPT Division Counsel, Ohio Department of Taxation,

11:45 am-12:15 pm: Buffet Lunch

12:15-1:00 pm – Lunch Keynote

1:15-2:15 pm – 4 Interactive & Concurrent Workshops



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- Workshop A: Construction Taxes and Contractor Issues
  - John Trippier, Zaino
  - Corporate Industry member pending
  - Corporate Industry member pending
  - Laura Stanley, Assistant Chief Counsel, Ohio Department of Taxation
- Workshop B: Manufacturing Taxes Update
  - Corporate Industry member pending
  - Hilary Houston, Partner, Vorys
  - Steve Russell, Business Tax Division Administrator, Ohio Department of Taxation,
  - Gabe Tomlin, Audit Division Administrator, Ohio Department of Taxation
- Workshop C: Recent Trends, Developments and Planning Opportunities for CPAs
  - Steve Dimengo, Buckingham
  - Greg Saul, Ohio Society of CPAs
  - Dave Supelak, Principal, CliftonLarsonAllen LLP
  - Alex Fant, Ohio Department of Taxation, Sales & Use Tax Division Counsel
- Workshop D: Tax Teaming Between Portfolio Companies and Private Equity Firms
  - Paige Purcell, Deloitte
  - Corporate Industry member pending
  - Corporate Industry member pending

2:15-2:30 pm – Networking Break

2:30-4:00 pm – 4 Interactive & Concurrent Workshops

- Workshop A: Ethical Considerations for Attorneys
  - Jen Lynch, Partner, Remington Road Group
  - Bill Nolan, Partner, Barnes & Thornburg
  - Matthew Jalandoni, Partner-In-Charge, Flannery Georgalis
- Workshop B: Remote Work, Close Scrutiny: Navigating the Municipal Tax Terrain
  - Dave Ebersole, Baker Hostetler
  - Amy Arrighi, RITA
  - Stephen Palmer, Plante Moran
- Workshop C: Midwest Regional Tax Update
  - Mike Merkel, Plante Moran
  - Mark Loyd, Dentons
  - Jackie Noyes, Reed Smtih
  - Aziza Farooki, Council on State Taxation
- Workshop D: Economic Incentives, Developments and Strategies
  - Jonathan Drake, Baker Hostetler
  - Rita Williams, ZHF
  - Corporate Industry member pending

4:40-5:30 pm – Roundtable Discussion with the Ohio Department of Taxation



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- Commissioner Patricia Harris, Ohio Department of Taxation
- Sarah O'Leary, Assistant Tax Commissioner, Chief Legal Counsel and Deputy Tax Commissioner, Ohio Department of Taxation
- Anna Marin Russell, Deputy Tax Commissioner, Ohio Department of Taxation

5:30-6:30 pm – Networking Reception

## **Thursday, August 14, 2024**

8:00-8:45 am – Breakfast and Check-In

8:45-9:45 am – Legislative Session: Ohio Tax Law Changes Post-Budget

- Tom Zaino, Managing Member, Zaino Hall & Farrin
- Tim Lynch, Policy Director, Ohio Department of Taxation
- Representative David Thomas, Ohio House of Representatives District 65

9:45-10:00 am – Networking Break

10:00-11:00 am – Navigating Tax Credits and Incentives: A Guide for Ohio's Industrial and Energy Sectors

- Chris Tassone, Taft
- Andrew Smith, AEP
- John Fils, Bricker Graydon

11:00-11:15 am – Transition to Workshops

11:15am – 12:15 pm – 4 Interactive & Concurrent Workshops:

- Workshop A: CAT News, Developments, and Audits
  - Richard Fry, Buckingham
  - ZHF
  - Javan Kline, Taft
  - Ben Waterman, Tax Appeals Division, Ohio Department of Taxation
- Workshop B: Real Property Update
  - Lauren Johnson, Vorys
  - Mike Ringle, Bricker Graydon
  - Kelly Tennant, Executive Administrator DTE, Ohio Department of Taxation
  - Matt Hollis, Division Counsel DTE, Ohio Department of Taxation
- Workshop D: Ohio Sales and Use Tax – Review of Recent Updates and Audit Policies
  - Bailey Roese, Dentons
  - Matt Piatt, RKL
  - Dave Ebersole, Baker Hostetler
  - John Trippier, ZHF
  - Chad Leon, Audit Division Administrator, Ohio Department of Taxation
- Workshop D: Federal Tax Update
  - Steve Eckert, Plante Moran



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- Christine Green, Steptoe-Johnson
- Panelist pending

12:15-1:30 pm – Lunch and Lunchtime Keynote: Bill Flick (EisnerAmper)

1:45-2:45 pm – 4 Interactive & Concurrent Workshops:

- Workshop A: VAT and Digital Tax Update
  - Corporate Industry member pending
  - Ted Bernert
  - Panelist pending
- Workshop B: Premiums Tax and Public Utility Property Tax
  - Justin Smith, Excise Tax Division, Ohio Department of Taxation
  - Corporate Industry member pending
  - Panelist pending
  - Panelist pending
- Workshop C: Direct Pay, CUT and Officer Liability Updates
  - Matt Stamp, Director, State and Local Tax Services, GBQ
  - Christine Mesirow, Former Chief of Taxation Section, Ohio Attorney General's Office
  - Panelist pending
- Workshop D: Income Tax Update
  - Adam Garn, Plante Moran
  - Kelvin Lawrence, Dinsmore & Shohl LLP
  - Matt Dodovich, PIT Division Executive Administrator, Ohio Department of Taxation,
  - David Peck, PIT Division Administrator, Ohio Department of Taxation

4:00-5:00 pm - Optional Ethics Session

- Joseph Caligiuri, Ohio Supreme Court
- Jeremy Hayden, Taft