

**TXCPA**  
**HOUSTON**  
**FOUNDATION**

# 2020 TAX EXPO

**JANUARY 6 - 7**

Houston Marriott Sugar Land  
6:45 a.m. - 6 p.m.

**Diamond Sponsor:**



Thank You to Our Platinum Sponsors:





# WELCOME

## **GENERAL INFORMATION:**

Registration will begin at 6:30 a.m. on January 6 and 7, 2020. Continental breakfast will be served during registration. The Early Bird session will begin at 6:45 a.m. The general sessions will begin at 7:50 a.m. and conclude at 4:50 p.m. Sips and CPE will begin at 5:10 p.m. for an additional hour of CPE. Lunch buffet will be served from 11:30 a.m. to 1 p.m. The registration fee includes all program materials, breakfast, lunch and refreshments.

## **LOCATION AND PARKING:**

Houston Marriott Sugar Land  
16090 City Walk  
Houston, TX 77479  
Phone: 713-654-1777

Complimentary on-site self parking within Sugar Land Town Square facility.

**COURSE MATERIALS:** Speakers' materials are available to download and print. You may access them through the link: <https://www.houstoncpa.org/tax-expo-materials-page>.

**CPE CERTIFICATES:** Will be emailed at the end of the day with electronic evaluations. Please take a few minutes to give us your feedback; these surveys allow us to plan better conferences year after year. If you did not receive any confirmation emails leading up to this conference or if you did not receive an email with the evaluation and CPE certificate, please contact TXCPA Houston at [cpe@houstoncpa.org](mailto:cpe@houstoncpa.org).

**SPONSOR BOOTHS:** Please make a point to visit the sponsor booths in the prefunction area. There is a list of sponsors at the back of the book.

**CONFERENCES IO:** Please visit <https://hcpas.cnf.io> to submit questions and answer any polling questions. This online Q&A also allows you to vote for any questions submitted by other attendees that you also would like an answer to, giving our speakers the best opportunity to answer the questions most relevant to this specific audience.

## **REMINDERS:**

- Smoking is not allowed in the classrooms or public areas.
- Please silence your electronic devices so the session won't be disturbed.
- Satisfactory temperatures are difficult to maintain. Always bring a sweater or jacket to ensure comfort.
- Lunch is provided as part of the conference registration fee.



# ANNOUNCEMENTS

**TAX INFORMATION:** The IRS will allow only 50% of all expenses for business meals/entertainment as deductible for tax purposes. The definition of meals includes continental breakfasts, refreshment breaks, lunches and receptions at professional seminars and conferences, including tax and gratuities. Cost of meals: \$133.00 per person.

**SOCIAL MEDIA:** Follow us on Twitter, Instagram and Facebook and use #2020TaxExpo and #TXCPAHouston

Twitter - @TXCPAHouston

Instagram - @txcpahouston

Facebook - TXCPAHouston

LinkedIn - company/houston-cpa-society

**WIFI ACCESS:**

Wifi code is Marriott\_CONF

Password is CPA2020

**CPE Credit:** 22 hours includes optional Early Bird and Sips and CPE

TSBPA rules states: the total CPE credits for a continuous program cannot exceed the actual time spent in the program. Continuous conferences and conventions, when individual segments are less than 50 minutes, should be combined and counted as one total program.

For every 50 minutes, you will receive 1 credit hour of CPE. For every 30 minutes, you can receive a half hour of credit. CPAs are responsible for reporting the correct amount of hours.

**Leaving Early:** Please sign out at the registration table.

**Additional Credits:** Please sign in at registration table for applicable credit hours.

**MCLE Credit:** 15 hours; does not include optional Early Bird or Sips and CPE sessions.

**EA and CFP® Credits:** Certain classes are eligible for EA and CFP® credit; see list at registration table.

# DAY ONE AGENDA

Time	Track 1	Track 2	Track 3	Track 4
6:45 - 7:35 a.m.	<b>Early Bird</b> <b>Modernizing Accounting Services: Developing Your Innovation Strategy</b> Donny Shimamoto, CPA.CITP, CGMA			
7:50 - 11:30 a.m.	<b>Individual and Small Business Tax Update</b> Steven J. Tillinger, CPA			
11:50 a.m. - 12:40 p.m.	<b>LUNCH - Promises and Perils: Port of Houston Poised for Growth</b> CAPT Bill Diehl, USCG (Ret.) P.E.			
1 - 1:50 p.m.	<b>SALT and New Property Tax Relief Act</b> Pete Lowy, JD, LL.M	<b>Navigating Elder Care</b> Cindy Hartman, BSN. RN	<b>Cryptocurrencies</b> Kevin F. Sweeney, Esq.	<b>2019 Update on Standards for Reviews, Compilations and Preparation Engagements</b> Kelly Hunter, CPA
2:05 - 3:45 p.m.	<b>20 Techniques and Strategies to Save Income and Transfer Taxes</b> Leonard Weiner, JD, CPA, MBA, AEP®	<b>Advanced Section 163(j) Compliance and Planning</b> Eric Horvitz, JD, LL.M	<b>Confused About Medicare? What you don't know will hurt your clients!</b> Toni King	<b>Transcending Technology: Your Path to Tax Innovation</b> Donny Shimamoto, CPA. CITP, CGMA
4:00 - 4:50 p.m.	<b>Improving Firm Profitability</b> Donny Shimamoto, CPA. CITP, CGMA	<b>Excel</b> Matt Davis, CPA, CFE	<b>Generation-Skipping Transfer Tax</b> Brett Berly, JD	<b>Real Estate Depreciation and Tax Strategies</b> Kevin Sullivan, P.E.
5:10 - 6 p.m.	<b>Sips and CPE</b> <b>From Hello to Goodbye: Myths and Misconceptions in the Marketplace</b> Mary Drake Bennett			

# DAY TWO AGENDA

Time	Track 1	Track 2	Track 3	Track 4
6:45 - 7:35 a.m.	<b>Early Bird</b> <b>Key Factors in the Valuation of a CPA Practice</b> Wade Holmes			
7:50 - 11:30 a.m.	<b>199A</b> Nick Millar, CPA and Jay White, CPA			
11:30 a.m. - 1 p.m.	<b>Lunch:</b> The Honorable Juan F. Vasquez, CPA, U.S. Tax Court			
1 - 1:50 p.m.	<b>Introduction to Shareholder and Partner Basis</b> Michelle D. Mullen, CPA	<b>Ethics for CPAs - It's a Matter of Choice</b> Deanna Sullivan, CPA, CIA, CFE, CGMA, CRMA	<b>Making a Deal with the IRS: A Look at the Offer in Compromise Program</b> Renesha Fountain, JD, LL.M	<b>Tax and Investment Planning from Ages 55-70</b> Steven R. Goodman, CPA, CFP®
2:05 - 3:45 p.m.	<b>Overview of Partnership Accounting and New Tax Return Reporting</b> Jay R. Houren, JD, CPA Katelyn Van Sickel, CPA	<b>Ethics for CPAs - It's a Matter of Choice (cont.)</b> Deanna Sullivan, CPA, CIA, CFE, CGMA, CRMA	<b>Financial Planning Panel</b> Nolan A. Moullé, III Freddy Garza, CFP®, CPA	<b>Qualified Opportunity Zone</b> Austin Carlson, CPA, JD Dan Kroll, JD
4:00 - 4:50 p.m.	<b>International Tax - GILTI/FDII</b> Sebastien Chain, JD, LL.M	<b>Ethics for CPAs - It's a Matter of Choice (cont.)</b> Deanna Sullivan, CPA, CIA, CFE, CGMA, CRMA	<b>Collection Alternatives</b> John Green, Ph.D, CPA, JD	<b>Recognizing Potential Fraud in Your Clients and Others</b> Chuck Cummings, CPA, CFF, CFE
5:10 - 6 p.m.	<b>Sips and CPE</b> <b>Mergers and Acquisitions of Small Businesses</b> Jason Sharp, CPA, JD, LL.M and Hobbs Gnaim, JD, LL.M			

# THANK YOU SPONSORS

## Diamond Sponsor

**Chamberlain, Hrdlicka, White, Williams & Aughtry**  
Sebastien Chain – 713.654.9633  
sebastien.chain@chamberlainlaw.com



**Chamberlain Hrdlicka**  
Attorneys at Law

Chamberlain Hrdlicka is a commercial law firm with offices in Atlanta, Houston, Philadelphia and San Antonio. The firm represents both public and private companies as well as individuals and family owned businesses across the nation. The firms' practice areas include tax planning and tax controversy, corporate, securities and finance, employment law and employee benefits, energy law, estate planning and administration, international and immigration law, commercial and business litigation, real estate and construction law.

## Platinum Sponsors

**Creative Financial Staffing**  
Pam Rodriguez – 713.260.5243  
pam@cfstaffing.com



CFS is a leading, employee-owned staffing firm—the largest one founded by CPA firms. With more than two decades of experience helping companies locate, attract and hire exceptional accounting, finance and IT professionals, CFS has unique resources to better understand hiring needs, attract higher-caliber candidates and assess candidate potential. Established in 1994, CFS today operates 30+ offices across 21 states and the Caribbean. Serving most major U.S. markets and beyond, CFS connects companies with candidates, from entry-level to executive level, temporary to direct hire and project support to interim management.

**Goodman Financial Corporation**  
Wade Egmon – 713.599.1777  
wegmon@goodmanfinancial.com



Goodman Financial has been helping clients in Texas and across the US achieve their financial goals for 30 years. We are committed to philanthropy and giving back to our community. As fee-only fiduciaries, we actively design and manage investment portfolios and provide financial advice while avoiding conflicts of interest or unnecessary risk.

This client-centric approach allows for greater flexibility, tax efficiency and lower expenses. We're proud of our 95% average annual client retention since the firm was founded. Our team is highly credentialed, with extensive experience and expertise. They make prudent investment decisions and maintain focus on our clients' long-term objectives.



# THANK YOU SPONSORS

## Silver Sponsors

### **Accounting Practice Sales**

Wade Holmes – 281.907.9545  
wade@aps.net

Janell Mickelson - 888.847.1040  
Janell@aps.net

Accounting Practice Sales specializes in the marketing and sale of accounting firms and tax practices. Our brokers have had unprecedented success in matching practice owners selling a firm with interested buyers.

### **BRAYN Consulting**

Justin DiLauro – 713.446.9537  
justin@braynconsulting.com

BRAYN is a niche consulting firm that guides businesses to greater value through tax credits and incentives, such as R&D Tax Credits, Cost Segregation, Sales and Use/Excise Tax Recovery, and Management Consulting. The BRAYNiacs are a team of lawyers, engineers, and accountants with extensive industry experience hailing from Big-4 and other national consulting firms. We work collaboratively with your CPA firm to assist in the review, documentation, and substantiation of the tax incentives specific to your business. Additionally, our management consulting services help businesses realize cost savings and maximize efficiencies, including treasury management and other accounting-related functions. At BRAYN, we focus on building quality relationships where we are a key partner in driving business prosperity.

### **Briggs & Veselka**

Sheila Enriquez – 713.667.9147  
senriquez@bvccpa.com

Briggs & Veselka is a Houston CPA firm in business for more than 40 years. Our mission is to deliver high quality, comprehensive business and financial services to individuals and middle market companies. We listen, lead and collaborate, striving to establish a legacy of loyalty.

### **CAMICO**

Richard Bacher – 800.652.1772 x 6710  
rbacher@camico.com

CAMICO's 32 years of operation are marked by steady growth and progress in serving CPAs nationwide, as envisioned by the group of CPAs who first started the company. And as a company focused on CPAs, our products and services are designed to deliver the expertise, support and solutions necessary to protect CPA firms. CAMICO offers a suite of CPA business insurance solutions such as Professional Liability, Employment Practices Liability, Business Owners Package and Workers' Compensation.



# THANK YOU SPONSORS

## Silver Sponsors

### **Cornerstone Wealth Management**

Gary Kinder – 713.882.2324  
gary.kinder@cornerstonewealthmanagment.net

A comprehensive financial services firm committed to helping people pursue their financial goals through education and coaching. We offer a wide range of financial products and services to individuals, professionals and business owners. We believe you will be better able to identify your goals and make sound decisions to help reach them by providing sound financial information.

### **ITC Industrial Tax Consulting**

Ed Parker – 281.819.5125  
ed@itctax.com

Industrial Tax Consulting is a premier leader in providing proactive property tax consulting services on a nationwide basis to clients concerned about their bottom line. Our offices focus on capitalizing on rapidly-changing market conditions and constant technological advancements to minimize property tax exposure by pursuing tax reduction opportunities and securing tax incentives.

We represent diversified industries, including energy, chemicals, utilities, building products and manufacturing. Our offices located in major Texas cities are supported by strategic partnerships with recognized industry leaders, providing our clients the competitive advantage required to flourish in today's ever-changing environment.

### **Xero**

Jackeline Velez  
jackeline.velez@xero.com

Xero is the emerging global leader of online accounting software that connects small businesses to their advisors and other services. Xero provides business owners with real-time visibility of their financial position and performance in a way that's simple, smart and secure.

For accountants, Xero forges a trusted relationship with clients through online collaboration and gives accountants the opportunity to extend their services.





# UPCOMING EVENTS

## **Federal Income Tax Update** *Steven J. Tillinger, CPA*

---

**Time:** 8:30 a.m. - 4:30 p.m.

**CPE:** 8 hours

**Cost:** \$250 – Houston/Other Chapter Member, Non-CPA  
\$350 – Nonmember CPA

**Dates:** January 29  
February 12

**Location:** Houston Chapter Learning Facility  
777 Post Oak Blvd. #500

**Date:** February 10

**Location:** Northwest Houston (Location to be announced)

## **Tax Update Classes** *Blaise Bender, CPA, JD, CGMA, MS, MPA*

---

**Time:** 8:00 a.m. – 4:00 p.m.

**CPE:** 8 hours each course

**Cost:** \$250 – Houston/Other Chapter Member or Non-CPA  
\$350 – Nonmember CPA

### **Individual Income Tax Update**

**Dates:** January 23  
February 6

### **Business Income Tax Update**

**Dates:** January 24  
February 7

**Location:** Houston Chapter Learning Facility  
777 Post Oak Blvd. #500

For more information or to register, visit [www.houstoncpa.org](http://www.houstoncpa.org).



# UPCOMING EVENTS

## **Ethics for CPAs: It's a Matter of Choice**

*presented by Deanna Sullivan, CPA, CGMA, CIA, CRMA, CFE*

---

**Date:**

February 27

March 27

April 24

**Time:** 12:30 p.m. – 4:15 p.m.

**Location:** Houston Chapter Learning Center  
777 Post Oak Blvd. #500

**CPE:** 4 hours Ethics credit

**Cost:** \$125 – Houston/ TSCPA Other Chapter Member or Non-CPA  
\$225 – Nonmember CPA

## **2020 Northwest Business Roundtable Discussion Group**

---

**Dates:**

January 16 - Blockchain, Speakers: Ryan Firth, Mercer Street and  
Shehan Chandrasekera, JAG CPAs & Company LLC

May 21 - Tax Season in Review, Speaker: Nick Millar, BKD

**Time:** 2:30– 5:30 p.m.

**Location:** Los Cucos, 22390 Tomball Parkway, Houston, Texas, 77070

**CPE:** 3 hours credit

**Cost:**

Annual Fee    \$90 – Houston/ TSCPA Other Chapter Member/Non-CPA  
                     \$180 – Nonmember CPA

Individual    \$75 – Houston/ TSCPA Other Chapter Member/Non-CPA  
Session Fee   \$150 – Nonmember CPA

**For more information or to register, visit [www.houstoncpa.org](http://www.houstoncpa.org).**



# UPCOMING EVENTS

January 9

**Morning Buzz in EADO**

Tout Suite

7:15 - 9:15 a.m.

January 9

**Young Professionals and  
NAIFA Happy Hour**

Preslee's Houston

5:30 - 7:30 p.m.

January 14

**Two Main Economic Powers**

**The Art of Retirement Cash Flow Management**

Houston Chapter Training Facility

Complimentary 1 CPE Credit

8 - 9 a.m.

January 14

**Investing - Separating Truths from Myths  
The Science of Cash Flow Management**

Houston Chapter Training Facility

Complimentary 1 CPE Credit

9 - 10 a.m.

January 15

**Expert Witness Toolkit:  
Fright, Flight and Freeze**

Houston Chapter Training Facility

1 CPE Credit

11:30 a.m. - 1 p.m.

January 15

**2020 TXCPA Houston Annual Business Meeting**

St. Regis

5:30 - 9 p.m.

January 24-25

**2020 TXCPA Midyear Board of Directors and Members Meeting**

Omni Houston Hotel

For more information or to register, visit [www.houstoncpa.org](http://www.houstoncpa.org).



# SAVE THE DATES

Please mark your calendars for these upcoming conferences.

## **Financial Reporting Symposium**

May 14, 2020

The Post Oak Hotel

Attendees receive relevant information and perspectives on current accounting, auditing, and financial reporting issues from a panel of nationally known professionals.

## **Spring Accounting Expo**

May 19 - 20, 2020

NRG Center

Network at our largest two-day event designed for members in business and industry with approximately 700 local CPAs.

## **Energy Conference**

August 2020

Location to be announced

Seasoned energy professionals and executives address the significant current issues affecting the energy industries as well as the accounting processes.

## **CFO/Controllers Conference**

September 17, 2020

Houston Marriott Sugar Land

A one-day conference caters to the financial leaders of small to mid-size companies.







