

8:00AM - 8:45AM

Registration and Breakfast

8:45AM - 8:55AM

Welcome - McKonly & Asbury

8:55AM - 9:45AM

Tweet, Follow, or Get Out of the Way: What Every Employer Needs to Know About Social Media in the Workplace - Todd Shill, Rhoads & Sinon (1 Other CPE Credit)

While Facebook and Twitter (the current darlings of the Web 2.0 movement) may one day fade from the spotlight in order to make way for newer competitors such as Instagram, it is safe to assume that social media is going to be around for quite awhile. As a result, it is no longer an option for employers to simply ignore their employees' use of social media. At the same time, taking a "heavy-handed" approach to employees' use of social media can get an employer in just as much trouble as ignoring the problem entirely. What was a "minor" issue only a few short years ago has exploded into a minefield of potential liability due to the ever-expanding reach of social media. This presentation will provide an overview of the myriad employment law issues implicated by an employee's use of social media and an employer's response (or failure to respond) to such use.

9:45AM - 10:00AM

Break

10:00AM - 10:50AM

Breakout Session A - Options are as follows:

Option A-1: Affordable Care Act (ACA) Employer Reporting: Requirements Under IRC Sections 6055 and 6056 - Laura Jansen, ADP (1 Tax CPE Credit)

This presentation will discuss the new reporting requirements for employers that were added as part of the Affordable Care Act (ACA). It will focus on the impact that ACA creates, the new tax reporting requirements under the ACA, and the timing of the reporting requirements. We will also take a closer look at employer reporting of coverage provided to employees.

Option A-2: Trust Taxation: An Untapped Planning Opportunity - David Warren, Bridgeford Trust Company, and William Lipkind, Wilson Elser (1 Tax CPE Credit)

Selecting the proper trust jurisdiction in the planning process is essential for several reasons. However, one of the most directly measurable benefits is in the area of trust taxation. This presentation will focus on specific planning areas that leverage South Dakota's no state income tax status in a way that could result in substantial tax savings, extending over multiple generations. We will take a close look at the Incomplete Non-Grantor Trust (ING), a vehicle that potentially eliminates state income/capital gain tax relative to the sale of a low cost basis asset. The newly enacted South Dakota Community Property Trust will also be considered, another powerful tax savings mechanism available to spouses that avoids capital gains on the subsequent sale of property held by a surviving spouse. David Warren will be co-presenting with NYC attorney William Lipkind, nationally recognized for his progressive trust strategies with articles routinely appearing in publications across the nation, including Trust & Estate Magazine. Mr. Lipkind is generally regarded as an expert relative to the ING Trust Strategy, having obtained several Private Letter Rulings from the IRS on the topic.

Option A-3: Identifying Important Numbers in Your Financial Situation and 8 Common Investing Mistakes - Tracy Burke, Conrad Siegel Actuaries (1 Other CPE Credit)

Attendees will learn the two most important "numbers" in personal finance: 1) how much money is needed to retire and 2) asset allocation (i.e. - how much to put in stocks, bonds, etc.). Attendees will have clear takeaways as handouts are provided to help attendees determine their "number". Additionally, the 8 common mistakes investors make and ways to avoid the "bumps in the road" will be discussed in this session.

Option A-4: Research & Development Tax Credit and Green Building Tax Incentives - Michael Maroney and CJ Aberin, KBKG (1 Tax CPE Credit)

The first part of this session will cover the fundamentals of the Research and Development (R&D) Tax Credit and topics include: history and recent developments, project qualifications, calculating the benefits, the chronology of a typical project, and common issues. During the second part of this session, the focus will turn to the various Federal, State, and Local incentives such as IRC Section 45L, which provides very significant tax credits for multifamily & condo developers and homebuilders. There will also be a discussion on how the Section 179D Commercial Energy Deduction can be "free" money to Architect & Engineering firms and Contractors.

Learn more and register at www.macpas.com/collaborate2016

Contact us at events@macpas.com or 717-972-5822

11:00AM - 11:50AM

Breakout Session B - Options are as follows:

These breakout sessions are repeats of Session A to allow attendees to maximize their session selections. See previous page for descriptions.

Option B-1: Affordable Care Act (ACA) Employer Reporting: Requirements Under IRC Sections 6055 and 6056 - Laura Jansen, ADP (1 Tax CPE Credit)

Option B-2: Trust Taxation: An Untapped Planning Opportunity - David Warren, Bridgeford Trust Company, and William Lipkind, Wilson Elser (1 Tax CPE Credit)

Option B-3: Identifying Important Numbers in Your Financial Situation and 8 Common Investing Mistakes - Tracy Burke, Conrad Siegel Actuaries (1 Other CPE Credit)

Option B-4: Research & Development Tax Credit and Green Building Tax Incentives - Michael Maroney and CJ Aberin, KBKG (1 Tax CPE Credit)

12:00PM - 12:45PM

Lunch

12:45PM - 2:25PM

Embracing Disruption - John McElligott, York Exponential and The Fortress Initiative (2 Other CPE Credits)

The world is amazing! Everyday there are more and more remarkable discoveries, inventions, and technologies being developed. It can seem overwhelming trying to plan for every possible scenario; trying to decipher the impact each new innovation will have on our businesses, communities, and our joint future. Industries that have seemed steady and unchanged are being rocked to their core. But for those of us willing to look deeper, we will not only begin to understand the "why's" but will see the unique and once in a lifetime opportunities hiding in emerging technologies and philosophies. During this keynote presentation, John will be talking about emerging topics in Exponential technology with a focus on Robotics, Artificial Intelligence, and IoT. Attendees will have the chance to start the conversation on what it means for communities just like ours to not only plan, think, and prepare for disruption but to succeed by simply Embracing it.

2:25PM - 2:40PM

Break

2:40PM - 3:30PM

Corporate Owned Life Insurance: What You Really Need to Know - Donna Wanamaker and Rachel Lower, Cornerstone Advisors (1 Other CPE Credit)

This presentation will be focused on corporate owned life insurance. More specifically talking about the fundamentals of advanced life insurance topics; how they work; the benefits of a corporate life insurance policy review; and weaving into the presentation deferred compensation plans and how they could be a great investment tool.

3:30PM - 4:20PM

The Impact of the Current Economic Environment on Business Banking - Kevin Ferryman, Citizens Bank (1 Other CPE Credit)

This session will include a discussion of the current economic dynamics and the impact to businesses, as well as how banks are responding.

4:20PM - 4:30PM

Closing Remarks - McKonly & Asbury

4:30PM - 5:30PM

Reception

Join us after the day's sessions for a reception featuring networking, appetizers, and drinks!