

## Monday, July 29, 2024

	<b>2:00 PM</b>	<b>Registration</b>
<b>Session 1</b>		<b>Welcome</b>   Amanda Garner, The Growth Partnership
	<b>2:00-3:40</b>	<b>Improv(e)ing Agility: Reigniting Communication and Leadership for an Adaptive Firm</b> Jon Colby
		<b>Awakening opportunities to maximize tax credits</b>   W. Kirshenbaum, Cherrytree Group
	<b>3:40-4:00</b>	<b>Break/Networking</b>
<b>Session 2</b>		<b>Activating the 1031 Exchange to Mitigate Tax Liabilities</b>   V. Nelson + B. Williams, Arno Wealth
	<b>4:00-5:00</b>	<b>Using Real Estate as a Tax-Advantaged Alternative Investment Strategy</b> K. Francetic, Realty Investor Capital
		<b>End of Day/Closing Statements</b>   Amanda Garner, The Growth Partnership
	<b>5:00-6:30</b>	<b>Cocktail Reception</b>

## Tuesday, July 30, 2024

	<b>7:30-8:30am</b>	<b>Breakfast</b>
<b>Session 3</b>		<b>Day 1 Recap</b>   Amanda Garner, The Growth Partnership
		<b>Uncovering the Power of Conservation Easements</b>   M. Pak, InVia Capital
	<b>8:30-10:00</b>	<b>Reimagining the Tax Advantages of Patents</b>   Andy Hein, Patent Veritas, LLC
		<b>Capitalizing on WOTC and BOI Options for Clients</b>   Pickens Calhoun, Rockerbox
	<b>10:00-10:40</b>	<b>Break/Networking</b>
<b>Session 4</b>		<b>Exploring Ai to Lead Business Owners Through a Successful Business Exit</b>   D. Deru, Orkid
		<b>Unlocking Cash Flow Solutions: Building a Profitable and Secure Business Foundation</b> J. Vaughn, Guardian Chamber
	<b>10:40-12:00</b>	<b>Optimizing Gift Trust – Solution for Pre-2026 Sunset Estate Tax Planning</b> J. Morrison, Frazer Ryan Goldberg & Arnold
		<b>Igniting Tax Savings Through Future Charitable Giving</b>   B. Gornto, iCLAT Solutions, LLC
	<b>12:00-1:10</b>	<b>Luncheon &amp; Exhibits</b>
<b>Session 5</b>		<b>Understanding IC-DISC - the What, How and Who</b>   D. Spray, Export Advisors, Inc
		<b>Exploring Tax Updates: Cost Segregation, 179D, 45L, and R&amp;D Tax Credits</b> H. Henderson, Engineered Tax Services
	<b>1:10-2:30</b>	<b>Investing in Solar Installations</b>   J. Thro, CKR
		<b>Navigating the Corporate Transparency Act: Compliance, Challenges, and Innovative Solutions</b>   Jay Feilen, FinCEN Advisors
	<b>2:30-3:10</b>	<b>Break/Networking</b>
<b>Session 6</b>		<b>Reimagining Premium Financed Life Insurance as an Estate Strategy</b>   N. Burgess, The Burgess Group
		<b>Rethinking Cybersecurity in 2024</b>   S. Long, viLogics
	<b>3:10-4:35</b>	<b>Exploring the Tax and Lifestyle Advantages of Charter Aviation</b>   Quinn & B. Peters,
		<b>End of Day/Closing Statements</b>   Amanda Garner, The Growth Partnership
		<b>Strategic Partner Hosted Dinners</b>

## Wednesday, July 31, 2024

	<b>7:30-8:30am</b>	<b>Breakfast</b>
<b>Session 7</b>		<b>Day 2 Recap</b>   Amanda Garner, The Growth Partnership
	<b>8:30-9:40</b>	<b>Reconceptualizing Talent Acquisition in the Accounting Profession Today</b>   J. Lee, TOA
		<b>Exploring Employee Stock Ownership Planning</b>   Steve Ferrara, Morgan Stanley
	<b>9:40-9:50</b>	<b>Break</b>
<b>Session 8</b>	<b>9:50-11:10</b>	<b>Breakout (Facilitated Roundtables)</b>
	<b>11:10-11:20</b>	<b>Break</b>
<b>Session 9</b>		<b>Breaking the Accountability Code to Maximize Results</b>   Amanda Garner, The Growth Partnership
	<b>11:20-12:15</b>	<b>End of Day/Closing Statements</b>   Amanda Garner, The Growth Partnership