

# **MUNICIPAL INCOME TAX SEMINAR AGENDA**

WEDNESDAY, July 11, 2018

- 11:30 am – 1:00 pm            **REGISTRATION**
- 1:00 pm – 1:50 pm            **PENDING MUNICIPAL TAX LAWSUITS**  
Speakers:     *Gene Hollins, Frank Reed, Thad Boggs, Frost Brown Todd LLC*
- 1:50 pm – 2:40 pm            **UNDERSTANDING LEGISLATIVE PROCEDURES**  
Speakers:     *Brad Barger, OML Partner*  
                    *Brian Barger, OML Partner*
- 2:40 pm – 3:00 pm            **BREAK**
- 3:00 pm – 3:50 pm            **TEAM FINANCE: THE LEADERSHIP PATH TO EXCELLENCE**  
Speaker:       *LaShea Lofton, Dayton Finance Director*
- 3:50 pm – 5:00 pm            **NET PROFITS COLLECTION: AN OVERVIEW**  
Speaker:       *Sarah O'Leary, Executive Director, Business, Excise & Energy*  
                    *Divison, Tax Department*
- 5:30 pm – 6:30 pm            **RECEPTION**

THURSDAY, July 12, 2018

- 8:00 am – 8:45 am            **REGISTRATION / CONTINENTAL BREAKFAST**
- 8:45 am – 10:00 am           **LEGISLATIVE UPDATE**  
*Kent Scarrett, Executive Director, Ohio Municipal League*
- 10:00 am – 11:15 am        **REVIEWING BUSINESS RETURNS**  
Speakers:     *Jeff Makowski, RITA*  
                    *Shylo Carmody, RITA*  
                    *Ted Nussman, Cincinnati*  
                    *Sue Bowman, Trotwood*
- 11:15 am – 11:30 am        **BREAK**
- 11:30 am – 12:30 pm        **DELINQUENCIES**  
Speakers:     *Patti Chittock, Lakewood*  
                    *Amber Greenleaf, RITA*
- 12:30 pm – 1:45 pm        **LUNCHEON**
- 1:00 pm – 1:50 pm            **UNDERSTANDING SERPS, DEFINED BENEFIT AND DEFINED CONTRIBUTION PLANS**  
Keynote Speaker:     *Dave Froling, Vorys*  
                                    *Jennifer Dunsizer, Vorys*
- 2:00 pm – 3:15 pm            **NET OPERATING LOSS CARRYFORWARDS AND OFFSETS**  
Panel:           *Scott Dunford, RITA*  
                    *Art Preiksa, Akron*  
                    *Mike Ryba, CCA*

3:15 pm – 3:30 pm

BREAK

3:30 pm – 4:45 pm

**REVIEWING INDIVIDUAL RETURNS**

Speakers: *Patti Chittock, Lakewood*  
*Tina Timberman, Athens*

5:15 pm – 6:30 pm

COCKTAIL RECEPTION WITH EXHIBITORS

6:30 pm – 10:00 pm

COSI AFTER DARK: CHRISTMAS IN JULY

FRIDAY, July 13, 2018

8:00 am – 9:00 am

REGISTRATION / CONTINENTAL BREAKFAST

9:00 am – 9:50 am

**PREPARING AND DELIVERING EFFECTIVE TESTIMONY**

*Ashley Brewster, Communications Director, OML*

9:50 am – 10:40 am

**TESTIMONY DEMO**

10:40 am – 11:00 am

BREAK

11:00 am – 12:15 pm

**THE ODDS AND ENDS OF TAXABLE INCOME**

Speakers: *Bejoy John, Dayton*  
*Carolyn Jordan, Dayton*  
*Mike McEnaney, Canton*  
*Linda Collins, Sharonville*  
*Robert Wright, Bowling Green*