

The Greens Country Club 13100 Green Valley Drive, Oklahoma City, OK 73120

8:00am Registration Open – Breakfast – burritos and fruit at your leisure

8:15am – Zoom Webinar Open

8:30am CPE - *An Economic Update and Outlook 2023-2024, including Energy Outlook presented by Steven C. Agee*



CPE: 1 Hour

Field of Study: Economics

Prerequisites: None

Program Level: Basic

Advanced Prep: None

Learning Objectives - attendees will be able to:

- Understand the economic impact of the pandemic and fiscal stimulus
- Understand the current situation with interest rates and inflation
- Learn about energy industry transitions

Speaker Bio: Dr. Agee is an economist specializing in oil and natural gas exploration and production, electric power generation, energy policy, banking, monetary policy, and macroeconomic theory. Having served in the private sector for thirty years as Founder, President and COO of oil and natural gas exploration and production companies, Dr. Agee has the unique combination of academic and private industry experience to administer, teach, design and implement new programs and speaker's series in the energy field. In addition, having served six years (2006-2011) on the Board of the Federal Reserve Bank of Kansas City, Oklahoma City Branch, the last three as its Chairman, Dr. Agee has enormous contacts and resources in the banking industry, and has taught Money & Banking at Oklahoma City University.

9:20am – 10 Minute Break

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9:30am CPE - *Oklahoma Tax Update presented by Tony Mastin*



CPE: 1 Hour

Field of Study: Taxes

Prerequisites: None

Program Level: Basic

Advanced Prep: None

Learning Objectives - attendees will be able to:

- Understand the latest information related to legislation enacted by the Oklahoma Legislature during the 2023 Legislative Session
- Learn about amendments concerning the administration of various taxes by the Oklahoma Tax Commission
- Understand the various audit practices of the Oklahoma Tax Commission

About Tony: Tony focuses his practice on advising individuals, high net worth families, tax-exempt organizations, and businesses of all sizes on planning matters involving state and local taxation (SALT), including sales and use taxes, multi-state taxation, and SALT controversy work. He is a member of the Independent SALT Alliance (ISA). A portion of his practice is also devoted to assisting developers, investors and businesses in obtaining and maximizing the use of business incentives, including tax exemptions and tax credits. Tony's achievements have earned him inclusion in Chambers USA Guide to America's Leading Lawyers for Business and The Best Lawyers in America (tax law).

Tony joined McAfee & Taft in 2019 following his retirement from the Oklahoma Tax Commission after 35 years of service, including 12 years in which he served as its executive director. Over the course of his illustrious career at the OTC, he also served as an attorney in the General Counsel's office, deputy director of the Motor Vehicle Division, deputy director of the Business Tax Division, and director of the Tax Policy and Research Division. As executive director from 2007 - 2019, he was responsible for managing the day-to-day operations of the agency, serving as its legislative liaison, and assisting in the proposal, drafting, review and analysis of tax legislation. In 2017, the Federation of Tax Administrators honored Tony with the Harley T. Duncan Award for his sustained and significant service to state tax administrators.

10:20am 10 Minute Break

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10:30am CPE - *Hitting The Wall - Leadership Lessons Learned from Running the Two Toughest Marathons in Asia* presented by Hollie Stuart



CPE: 2 Hours

Field of Study: Personal Development

Prerequisites: None

Program Level: Basic

Advanced Prep: None

Learning Objectives - attendees will be able to:

- Open you and your team to greatness by leveraging opportunities for growth
- Cultivate a positive mindset by learning strategies to overcome challenges and setbacks
- Foster team collaboration by learning strategies to promote teamwork, idea sharing, and collective success

Speaker Bio: Hollie Stuart, SPHR, SHRM-SCP, MA is a dual-certified human resources professional and #1 bestselling / award-winning author and keynote speaker. She most recently published her moving memoir *I Can See for Miles*, which has won eight national and international awards, including the 2023 International Book Awards, the 2023 Indie Excellence Awards, the 2023 Next Generation Indie Book Awards, and the 2023 BookFest® Awards. It also placed as a Finalist in the 2023 Oklahoma Book Awards. In addition to motivational and inspirational speaking, Hollie is a certified human resources professional and former personnel manager.

An avid world traveler, adventurer, marathoner, and outdoors enthusiast, Hollie is fulfilling her goal of running a marathon on all seven continents, most recently completing the 2022 Queenstown Marathon in New Zealand. In 2019, she ran the Great Wall Marathon in China and the Thunder Dragon Marathon in Bhutan only eight days apart. In her memoir *I Can See for Miles*, she regales her journey to Tanzania, where she completed the 2017 Mount Kilimanjaro Marathon and scaled Mount Kilimanjaro, the tallest freestanding mountain in the world. Both professionally and personally, Hollie devotes herself to humanitarian and social causes, advocating for awareness and prevention of various forms of discrimination and harassment. In her free time, she practices yoga, meditation, and strength training.

12:10pm 40-Minute Plated Lunch and Zoom Break

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Zoom Attendees, switch to afternoon webinar link for the remaining sessions.
Zoom will be open by 12:40, CPE session begins at 12:50.

12:50pm CPE - *Tax Update for Accountants that Don't Do Taxes* – Presented by Joshua Jensen



CPE: 1 Hour

Field of Study: Taxes

Prerequisites: None

Program Level: Basic

Advanced Prep: None

Learning Objectives - attendees will learn:

- Financial statements you hate but need for taxes
- The truth about LLC's for taxes
- 3 key areas to be IRS audit proof
- Why the IRS sees just about everyone as a W-2 employee

Speaker Bio: Joshua has 31 years of public accounting experience in tax, specializing in LLC, partnership, S corporation, and related individual tax matters. He still practices in the trenches in the CPA firm he founded nearly 26 years ago. JJ has traveled to over 60 cities, presenting tax courses to thousands of fellow CPAs covering the latest tax laws and strategies. The U.S. Chamber of Commerce named him top 10 Small Business Expert to follow. He has appeared on local as well as national news programs for the last 20 years, becoming a regular tax season guest on local and national radio programs.

Joshua Jensen is a licensed CPA in Oklahoma and Texas, and a member of the American Institute of CPAs and Oklahoma Society of CPAs. JJ serves on the Tax Committee for the Oklahoma Society of CPAs and has served as the past Chairperson of the OSCP A Educational Foundation and was named CPA of the year by his CPA peers. Joshua is a 1993 graduate of Abilene Christian University where he earned is accounting degree. JJ the CPA has over 91,000 SUBSCRIBERS and over 7.4 million views on his YouTube channel "JJ THE CPA," and has authored 2 books available on Amazon.

1:40pm 10 Minute Break

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1:50pm CPE – *Executive Cybersecurity Awareness presented by Eric Kehmeier*



CPE: 1 Hour

Field of Study: Information Technology

Prerequisites: None

Program Level: Basic

Advanced Prep: None

Learning Objectives - attendees will be able to:

- Understand the latest updates in cybersecurity
- Learn about current strategies to increase security in your system
- Understand current trends and upcoming technologies

Speaker Bio: Having a passion to serve businesses by improving technology led Eric to start Broken Arrow based IBT. He continues to be excited about cultivating a positive impact for his team and the community after recently merging with The 20 MSP in February of 2023.

Eric has been honored by the Tulsa Regional Chamber as a Young Entrepreneur of the year, the Broken Arrow Chamber Business Person of the year, and a Men of Distinction Honoree. Under Eric's leadership, IBT was honored to be on the INC. 5000 list four times and on the MSPmentor 501 Global list five times, which highlights the top 501 Managed Service Providers in the world. Eric also serves on the NSU College of Business and Technology Advisory Board and is a proud Eagle Scout.

2:40pm Seminar Ends – Thank you for attending!

Next week you'll receive an email with instructions for your evaluation of today's seminar and to download your CPE certificate.