

OSEA Oklahoma City Annual Seminar

Francis Tuttle Technology Center

12777 N Rockwell Ave

Oklahoma City, OK 73142

Schedule of Events

Wednesday October 25, 2023

8:00 am – 9:40 am	Decedent Estate and Final 1040 (2 hours) – Allan J. Reynolds, EA
9:40 am – 10:00 am	Morning Break
10:00 am – 10:50 am	Trust and Estates – Taxation, Forms and Elections (1 hour) – Michael Miranda, CPA
11:00 am – 11:50 am	IRS Stakeholder Liaison Presentation (1 Hour) – Mercean Lam, IRS
11:50 am – 1:00 pm	Lunch Break (Provided)
12:10 pm – 12:40 pm	OSEA Annual Meeting
1:00 pm – 1:50 pm	Legislation Updates (1 Hour) – Michael Miranda, CPA
2:00 pm – 2:50 pm	Legislation Updates (1 Hour) – Allan J. Reynolds, EA
2:50 pm – 3:10 pm	Afternoon Break
3:10 pm – 4:50 pm	Trust and Estates – Turning Theory into Practice (2 hours) – Michael Miranda, CPA
4:50 pm – 5:00 pm	Final remarks and adjournment

Continuing Education Provided:

Decedent Estate and Final 1040 (2 hours)
Trust and Estates – Taxation, Forms and Elections (1 hour)
IRS Presentation (1 Hour)
Legislation Updates (2 Hour)
Trust and Estates – Turning Theory into Practice (2 hours)

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Thursday October 26, 2023

8:00 am – 9:40 am	Tax Planning for the Moderate Income Client (2 hours) – Allan J. Reynolds, EA
9:40 am – 10:00 am	Morning Break
10:00 am – 10:50 am	Secure Act 2.0 (Part II) Provisions Impacting the Tax and Financial Planning for Clients (1 hour) – Michael Miranda, CPA
11:00 am – 11:50 am	Related Party Transactions (1 hour) – Allan J. Reynolds, EA
11:50 am – 1:00 pm	Lunch Break (Provided)
12:00 pm – 12:50 pm	Oklahoma Tax Commission Update – Mike Kaufmann, OTC
1:00 pm – 1:50 pm	Ethics (1 Hour) – Allan J. Reynolds, EA
2:00 pm – 2:50 pm	Ethics (1 Hour) – Michael Miranda, CPA
2:50 pm – 3:10 pm	Afternoon Break
3:10 pm – 4:00 pm	(1 Hour) – Megan Killian, CAE
4:00 pm – 4:50 pm	S-Corp (Form 7203) Partnership Basis and BBA (1 hour) – Michael Miranda, CPA
4:50 pm – 5:00 pm	Final remarks and adjournment

Continuing Education Provided:

Tax Planning for the Moderate Income Client (2 hours)

Secure Act 2.0 (Part II) Provisions Impacting the Tax and Financial Planning for Clients (1 hour)

Related Party Transactions (1 hour)

(1 Hour)

Ethics (2 Hour)

S-Corp (Form 7203) Partnership Basis and BBA (1 hour)

NAEA Credit (1 CPE Hour): Oklahoma Tax Commission – Oklahoma Tax Update

NOTE: While the Oklahoma Tax Commission Update course does not count for IRS Continuing Education, this training is eligible for submission for NAEA continuing education credit. Please verify with your professional association if this class is intended to be submitted to other organizations.