



# THE OHIO STATE UNIVERSITY

## INCOME TAX SCHOOLS

### Agenda: Hartville, November 20 - 21

| Day One       |   |             |
|---------------|---|-------------|
| 7:30 a.m.     | Registration Open                           |             |
| 8:10 – 8:25   | Welcome/<br>Introductions                   | Ward        |
| 8:25 – 9:25   | Religious Organizations<br>Trusts & Estates | Lawrence    |
| 9:25 – 10:25  | Installment Sales                           | Liuzzo      |
| 10:25 – 10:40 | Break                                       |             |
| 10:40 – Noon  | New Legislation                             | Lawrence    |
| Noon – 12:50  | Lunch                                       |             |
| 12:50 – 1:40  | Ohio Tax Issues                             | ODT         |
| 1:40 – 1:50   | Break                                       |             |
| 1:50 – 2:50   | IRS Issues                                  | Gray        |
| 2:50 – 3:00   | Break                                       |             |
| 3:00 – 4:00   | Individual Tax Issues                       | Liuzzo      |
| 4:00 – 4:10   | Break                                       |             |
| 4:10 – 4:40   | Rulings and Cases                           | Lawrence    |
| 4:40 – 4:50   | Instructor Panel                            | Instructors |

| Day Two       |  |                |
|---------------|--|----------------|
| 7:45 a.m.     | Registration Open                          |                |
| 8:15 – 9:25   | Retirement Issues                          | Liuzzo         |
| 9:25 – 9:35   | Break                                      |                |
| 9:35 – 11:00  | Business Entities/<br>New Legislation      | Lawrence       |
| 11:00 – 11:10 | Break                                      |                |
| 11:10 – Noon  | Home Ownership                             | Liuzzo         |
| Noon – 12:50  | Lunch                                      |                |
| 12:50 – 1:40  | Agricultural & Natural<br>Resources Issues | Marrison/Lewis |
| 1:40 – 1:50   | Break                                      |                |
| 1:50 – 2:55   | New Legislation &<br>Rulings & Cases       | Lawrence       |
| 2:55 – 3:05   | Break                                      |                |
| 3:05 – 4:05   | Business Tax Issues                        | Liuzzo         |
| 4:05 – 4:15   | Instructor Panel                           | Instructors    |
| 4:15 – 4:20   | Wrap-up                                    | Ward/Lewis     |
| Adjourn       |  |                |