

Dates: January 28–29, 2026

Day 1: January 28, 2026

Welcome & Opening Remarks - Jill Tichenor, Delap LLP

- Let's Give Them Something To Talk About (30 min)

Washington Tax Developments

- Antio Decision (15 minutes)
- Newly Taxable Services for Sales Tax **(1 hr) – Maria Keating**
- Antio - **15 minutes**

OB3 Updates & SALT Interplay

- CBIZ (30 min) **John Bonk**

Sales Tax Considerations for the Construction Industry 1hr Adrien Echols Bennet Thrasher

Sales Tax Developments 1 hr DiAndria Green, Bennet Thrasher

Audit Activity Among the States

- **Panel Discussion (1.5 hr)**
 - CAT Agency
 - WA Agency
 - NYC Rent
 - AZ TPT Contractor

Winning Clients with SALT Expertise (30 Min)

- Client Examples (Invite the client to share)

State Consolidated Return Filing Elections: (30 Min) Matt Laney Bennett Thrasher

- Revisiting an Often Overlooked Planning Opportunity

Day 2: January 29, 2026

Mergers & Acquisition Due Diligence Panel Discussion (1hr)

- Preparation Before the Offer
- Is it Part of Annual Compliance or a Discrete Offering?

Practice Growth Strategies (1.5 hr)

- How Do You Approach Growth in Your Practice?
- Attracting & Training CPAs to the SALT Life ` `
- The Right Way to Structure a SALT Practice

New Technologies (1hr)

- AI Opportunities and Risks
- Address Lookup Write Back for Portland Metro
- Vendors

State Tax Audit Defense Techniques (1hr)