

AGENDA

MONDAY, NOVEMBER 8

8:30AM – 11:00AM STRATEGIC PLANNING SESSION [DELTA SECTION – BAYOU D]
One representative from each member firm should plan to attend.

11:00AM – 1:00PM LUNCH ON YOUR OWN

1:00PM CAN BOOTCAMP KICKOFF: WELCOME & INTRODUCTIONS [DELTA SECTION – BAYOU D]

1:20PM – 2:20PM SALES TAX ISSUES FOR CONTRACTORS & MULTI-STATE PROJECTS [DELTA SECTION – BAYOU D]

Gain an understanding of the nuances of sales and use taxes related to their construction clients and the states in which they operate. This includes Paying tax on materials – when and why; Collecting tax on contracts – Lump Sum, Time and Materials, Cost Plus; Documentation of specific contract and service types -why it's important; Exemptions and what documentation is needed; There will also be a lengthy Q&A and example session to walk through sample transactions for construction clients. **Presented by Tim Howe, Smith & Howard**

2:40PM – 4:20PM TAX UPDATE [DELTA SECTION – BAYOU D]

Tax Updates that will have a direct impact on our construction clients. The discussion will be centered on tax planning and tax considerations under the current framework for 2021 as well the impact of the tax proposals that are pending approval. **Presented by Mark Abrams & Melissa Henderson, Smith & Howard**

2:40PM – 3:40PM FUNDAMENTALS OF CONSTRUCTION ACCOUNTING [DELTA SECTION – BAYOU E]

This is a great session for both audit and tax professionals that are new to construction accounting, we'll cover concepts that make Construction unique, and get a peak into a CAN member's 'special sauce'. **Presented by Lohan Kotze, Rodefer Moss & Co**

3:40PM – 4:30PM CONSTRUCTION REVIEWS FOR IN-CHARGE SENIORS [DELTA SECTION – BAYOU E]

Presented by Sheryl Tschimpke, PIVOT CPAs and Scott Scheef HBE CPAs

6:00PM FUN EVENT! NASHVILLE SINGER/SONGWRITER BRADEN BAUGH + HEAVY HORS D'OEUVRES + BEVERAGES
[GARDEN CONSERVATORY - CRYSTAL GAZEBO]

TUESDAY, NOVEMBER 9

7:00AM – 8:00AM BREAKFAST [DELTA SECTION – BAYOU D]

8:00AM – 8:50AM TDOT PERSPECTIVE ON INFRASTRUCTURE BILL [DELTA SECTION – BAYOU D]

Special Guest Speaker Paul Degges, Deputy Commissioner & Chief Engineer; Tennessee Department of Transportation. Mr. Degges oversees the design and implementation of the Department's engineering projects, oversees the awarding of thousands of contracts, and is responsible for the activities of 12 divisions and 4 regional offices. He also works closely with appointed and elected officials on a state and national level in formulating transportation policy.

9:00AM – 10:30AM SURETY ROUNDTABLE [DELTA SECTION – BAYOU D]

Members of the surety panel will discuss the current state of Surety, 2020 Financial Statement items of note, as well as 2021 forward looking considerations. Westfield will be doing an interactive case study of what happens when things go bad! **Presented by Jonathan Price, Westfield and Matthew Clarke, CIG Bonds**

10:30AM – 10:45AM BREAK

10:45AM – 11:45AM MANAGER ROUNDTABLE ON ENGAGEMENT EFFICIENCY [DELTA SECTION – BAYOU D]

Several firm representatives will share insight into how they plan engagements as well as some beneficial procedures they implement to create efficiencies when in the field. **Moderated by Kyle Christensen, HHM CPAs. Panelists: Drew Nelson, Rodefer Moss; Brittany Carman, HHM; Kate Flucker, BMSS, and Ashley Bolick, Williams Overman Pierce.**

11:45AM – 12:45PM LUNCH

12:45PM – 1:35PM IDENTIFYING LITIGATION RISKS FOR CONTRACTORS [DELTA SECTION – BAYOU D]

Costly litigation and legal non-compliance will affect your construction clients' bottom line. Join us for a panel discussion as they discuss common legal challenges construction clients face and the first signs of trouble that should lead to an attorney referral. **Presented by Baker Donelson attorneys, Hannah Elizabeth Jarrells, L. Mabel Arroyo Laura E. Carlisle, and Melissa Vest.**

AGENDA

TUESDAY, NOVEMBER 9 - CONTINUED

1:40PM – 2:30PM DEFERRED INCOME TAXES [DELTA SECTION – BAYOU DJ]

This is a great session for beginner and intermediate levels on both sides of the house! The purpose of this session is to demystify deferred income taxes for auditors and helping tax professionals understand what auditors do with this information. Presented by David Lee, Smith & Howard

2:30PM – 3:00PM BREAK

3:00PM – 3:50PM BENCHMARKING & ANALYTICS: BUILDING YOUR PRACTICE & ADVISING YOUR CLIENTS
[DELTA SECTION – BAYOU DJ] Presented by Glenn Dunlap, PeerView Data

4:00PM – 5:00PM REAL ESTATE DEVELOPER VS. INVESTOR [DELTA SECTION – BAYOU DJ]

Many contractors believe they should also either be in on the development side or want the opportunities for favorable tax treatment by being classified as an investor. This session provides some insight into proper entity planning as well as identifying land mines that could “trip” up a project being construed in a manner in which it was not intended. Presented by Kyle Christensen, HHM CPAs

6:00PM LOCAL BEER TASTING + HEAVY HORS D'OEUVRES + BEVERAGES
[GARDEN CONSERVATORY - CRYSTAL GAZEBO]

A local Nashville Beer Expert will educate our group on the diverse beers Nashville has to offer! We'll also sample the best of the local brews!

WEDNESDAY, NOVEMBER 10 [ALL EVENTS IN DELTA SECTION – BAYOU DJ]

7:00AM – 8:00AM BREAKFAST

8:00AM – 9:00AM BDO Construction Update

An update from BDO Construction Leader Ian Shapiro

9:00AM – 9:30AM BRN OVERVIEW: CONSTRUCTION INDUSTRY RESOURCES YOU NEED TO KNOW ABOUT

An update from BDO Alliance Business Resource Network Leader Tom Takasaki

9:30AM – 9:45AM BREAK

9:45AM – 10:30AM CONSTRUCTION TRENDS & OUTLOOK FROM AGC'S CHIEF ECONOMIST

Ken Simonson has been chief economist for the Associated General Contractors of America, the leading trade association for the construction industry, since 2001. He has more than 40 years of experience analyzing, advocating and communicating about economic and tax issues.

10:30AM – 10:45AM BREAK

10:45AM – NOON PARTNER ROUNDTABLE: ASK US ANYTHING

Open Mic. Ask Us Anything - seriously. Come prepared with questions! This is an open forum general session where partners from various firms within CAN will discuss a variety of topics, such as Client Acceptance and Continuance – how do you deal with the one you wish got away? What trends you are seeing in your client base? How do you combat strains on realization? How are you managing implementation of the new audit standards? How are you managing remote work in this 'new' environment? Are you finding new service offerings with your client base?

Moderated by David Lee, Smith & Howard; Panelists: Mike Kapics, HBK; Mark Korte, Scheffel Boyle; Chris Hatcher, Baldwin CPAs

ADJOURN

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