INDIANA TAX FORUM

Agenda

THURSDAY, DECEMBER 10, 2026 · INDIANA CPA SOCIETY – INDIANAPOLIS, IN

CPE: 8 HOURS (1 HR ETHICS)

MORNING

8:30–9:30 a.m.

Ethics Under Pressure: Protecting Judgment in Tax Practice

General Session · 60 min · Karl Ahlrichs, SHRM-SCP, SPHR, CSP, Consultant and Facilitator - ExpertSpeaks

Start the conference with a solid Ethical foundation! Tax professionals face decisive moments when client expectations, fee pressure, deadlines, and new technology collide. Using practical ethical scenarios, participants will examine how to retain professional judgment without losing sight of a good client experience. This interactive session explores ethical boundaries in client acceptance and retention, dealing with questionable tax information, and AI-assisted work, and provides a repeatable process for inquiry, escalation, and documentation.

9:30–9:40 a.m. — BREAK · 10 MIN

9:40–10:50 a.m.

Clients & Congress Moved; Now What?

General Session · 70 min · Sali L. Sheafor, CPA – TAP Consulting, LLC

Clients are switching accounting firms almost as quickly as Congress changes tax laws. Keeping an eye on those changes and the nuances each new client brings, while offering strategic moves before the year ends, continues to be something of an acrobatic move.

LEARNING OBJECTIVES

- Evaluating new clients; declining engagements that aren't the right fit
- Managing carryovers while strategizing for tomorrow
- Staying abreast of new tax laws

10:50–11:00 a.m. — BREAK · 10 MIN

11:00 a.m.–12:15 p.m.

Legislative Update

General Session · 70 min · Lou Belch, President – The Corydon Group

Join Society lobbyist, Lou Belch, for a discussion on the post-election political environment in Indiana. This session offers invaluable perspectives for tax professionals seeking to stay ahead in a rapidly evolving political and legislative landscape.

12:15–1:00 p.m. — LUNCH BREAK · 45 MIN

AFTERNOON

1:00–2:00 p.m.

Indiana Department of Revenue Update

General Session · 60 min · Collin Davis, Director of Tax Policy; Emily Wann, Executive Director of Operations & Chief Information Officer; Tamara Wolfe, Taxpayer Rights Advocate — Indiana Department of Revenue

Join us for a high-level briefing on the latest developments at the Indiana Department of Revenue. Collin Davis, Tamara Wolfe, and Emily Wann will provide insights into current initiatives, recent policy updates, and the agency's priorities moving forward. This overview will give executive leaders a clear picture of what's happening across the agency and what's on the horizon.

2:00–2:15 p.m. — BREAK · 15 MIN

2:15–3:25 p.m.

Client Conversations & The Identification of SALT Issues & Opportunities

General Session · 70 min · Laura Rakaska, CPA, Senior Manager – Blue & Co., LLC

The identification of State and local tax issues and opportunities often begins with an ordinary client conversation: a new out-of-state customer, a remote employee, a business acquisition, an entity restructuring, or a year-end planning question. Through four practical case studies, this interactive session will help Indiana tax practitioners: recognize potential income, sales/use, payroll, and owner-level tax issues and opportunities; identify the facts and other information needed before a conclusion/recommendation can be reached; and develop practical next steps for compliance, planning, documentation, and client communication.

3:25–3:35 p.m.	BREAK · 10 MIN
3:35–4:45 p.m.	**Don't Click That! Tax Office Security** *General Session · 70 min · Ryan Jennings, Tax Speaker* Cybercriminals know tax offices hold valuable data, and they're targeting your team—not your firewall. Phishing emails, spoofed websites, and social engineering scams have become increasingly sophisticated, with AI-powered attacks making fake messages harder to spot than ever. This course teaches tax professionals how to recognize these threats before it's too late, implement a no-click policy that actually works, and train staff to be the first line of defense rather than the weakest link. We'll walk through real-world examples of attacks targeting tax offices, cover the technical security basics every practice needs…
4:45 p.m.	**ADJOURN**