



Conference Fee
Discount By
June 30, 2026

NTI 2026 SEA ISLAND CONFERENCE

THE CLOISTER
SEA ISLAND, GEORGIA
AUGUST 13-19, 2026



**NTI 2026 CONFERENCE PROGRAM
THE CLOISTER
SEA ISLAND, GEORGIA
AUGUST 13-19, 2026**

- Location:** **THE CLOISTER**
100 Cloister Drive, Sea Island, GA 31561
Phone: 888-565-2364 Website: www.seaisland.com
- Airports:** Jacksonville International Airport (JAX) and Savannah International Airport (SAV)
- Transfers:** Car rental is recommended – One-hour drive from Jacksonville International Airport and an hour and 15-minute drive from Savannah International Airport.
- Directions:** Visit: www.mapquest.com
- Weather** Most summer days will be between 80° and low 90s.° Evening temperatures are approximately 70°.
- Area Info:** Visit: www.exploregeorgia.org



**CALL 888-515-3674 (Extension 1) or FAX 888-552-9749 or
EMAIL: conferences@nticpe.com**

The Cloister and Sea Island– 7-Day/6-Night Package

The Cloister is one of the East Coast’s finest resorts. Set on five miles of private beach, it offers in-shore (creek side) and on-shore fishing, kayaking, tennis, ballroom dancing lessons, skeet shooting school, formal main dining room, three restaurants, and the elegant Cloister Spa. It is the only resort in the world to have received four Forbes Five-Star awards for twelve consecutive years.

Since 1928, Sea Island has been known as an exceptional destination, appealing to those who appreciate gracious service and heartfelt hospitality. Located on the southeastern coast of Georgia, Sea Island features five miles of private beach, a Beach Club, tennis center, Yacht Club, Shooting School, and children’s programs, as well as three championship golf courses, including Seaside and Plantation, home of the PGA Tour’s RSM Classic.

Check-in: 4:00pm

Hotel Rating: AAA 5-Diamond and
Forbes 5-Star

Check-out: 12:00 (Surcharges may apply for late check-outs)

Valet Parking: \$30 per night – **Self-Parking:** \$25 per night
(subject to change)



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Accommodations:

The Cloister offers several options of luxurious room accommodations with each room finely detailed, spacious, and welcoming. All rooms offer deep-soaking tub, rain-head shower, robe and slippers, mini fridge, Samsung sound system, Wi-Fi, in-room dining.

The Cloister Garden Wing: (550 sq. ft.) This finely detailed and welcoming room has one king bed or two queen beds, and a spacious master bathroom featuring a deep soaking tub and walk-in shower. Each room offers a private patio or balcony and is situated among the lush captivating gardens and manicured grounds in the Cloister in the wings of the Main Building. Maximum: 4 persons



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River View King: (700 sq. ft.) This finely detailed and welcoming room is located in the North or South Wing adjacent to the Main Building, offering a private patio or balcony overlooking the Black Banks River and the golden marshes. Each room has one king bed, and a spacious master bathroom featuring a deep soaking tub and walk-in shower. The rooms are appointed in a Spanish Mediterranean décor, with rich wood furnishings, exposed beam ceilings, hardwood floors and handmade Turkish rugs. Maximum: 4 persons. **LIMITED AVAILABILITY.**



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Beach Club Ocean View (two queen beds): This spacious 700 square-foot room features **two queen beds**, and is situated atop or adjacent to The Cloister Beach Club with a private patio or balcony overlooking three pools and five miles of private beach and the Atlantic Ocean. The bathroom has a deep soaking tub and walk-in shower. Maximum: 4 persons **LIMITED AVAILABILITY.**



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River View One-Bedroom Suite: (950 sq. ft) Located in the Cloister Main Building overlooking the tidal river and golden marsh, these elegantly detailed suites have a Spanish Mediterranean décor. The master bedroom features either one king or two queen beds (subject to availability). The suite features a separate living room with a half bath and sleeper sofa bed. Most suites have balconies. The master bath features a deep soaking tub and walk-in shower with lustrous wood furnishings, exposed beam ceilings, hardwood floors and handmade Turkish rugs. Maximum 4 persons. **LIMITED AVAILABILITY.**



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SPECIAL- FREDERICA ONE-BEDROOM SUITE- 1,260 SQ FT**ONLY ONE AVAILABLE**

Frederica One-Bedroom Suite: A unique, spacious and welcoming 1,260 sq. ft. suite with Spanish Mediterranean décor. Private master bedroom with one king bed, a spacious living room with a half bath and fireplace, and large wrap-around balcony overlooking the tidal river and golden marshes. The master bath features a deep soaking tub and walk-in shower. Located in the North Wing on the first floor.



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Hotel Package includes: 6-night hotel accommodations including all taxes and room gratuities, and a resort fee. No charge for Third/Fourth Person. Extra nights and single rates: Please ask for details. ***NO REFUNDS FOR EARLY DEPARTURES.***

Resort Fee: Included in the hotel package is a resort fee that includes Wi-Fi in guest rooms and lobby, local calls, unlimited access to the Fitness Center and Sea Island Beach Club, shuttle transportation between The Cloister, The Lodge and Retreat, in-room Nespresso hot beverage program, complimentary use of BMW Courtesy Car (based on availability), beach chairs, towels and umbrellas, morning coffee and pastries, afternoon tea and cookies, in-room evening bottled water and ice delivery, and access to PressReader app offering over 4,000 newspaper and magazine titles.

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SPECIAL UPGRADE PRICE

- ***River View King***
- ***Beach Club Oceanview***
- ***River View One-Bedroom Suites***
- ***Frederica One-Bedroom Suite***

LIMITED AVAILABILITY

HOTEL PACKAGE COST- 7 DAYS-6 NIGHTS

<u>Room category</u>	(Per Person) Double Occupancy <u>Package Cost**</u>
The Cloister Garden Wing King	\$2,619
River View King- LIMITED AVAILABILITY	\$2,969
Beach Club Ocean View - LIMITED AVAILABILITY	\$3,328
River View One- Bedroom Suite - LIMITED AVAILABILITY	\$3,569
SPECIAL Frederica One-Bedroom River View Suite - SOLD OUT	\$3,969

** Total cost per room, multiply the package cost by 2.

Note: Hotel package costs are subject to change without notice.

FULL REFUND OF ALL HOTEL AND CONFERENCE FEE CHARGES ON OR BEFORE MAY 1, 2026

HOTEL PACKAGE PAYMENT:

With reservation:
May 1, 2026

\$500 per person (see reservation form below)
Balance Due

Hotel Cancellation: Refunds for hotel cancellations will be made, **IN FULL**, if cancellation is made in writing **on or before May 1, 2026**. **No hotel refunds after May 1, 2026**. Any cancellations on or before **May 1, 2026** must be made in writing and emailed to conferences@nticpe.com or faxed to [888-552-9749](tel:888-552-9749). No refunds for early departures.

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Hotel Amenities and Services: The resort offers numerous services and activities: Biking, Boating, Falconry, Fishing, Horseback riding, History programs, Hunting and Shooting, Nature Activities, Beach Club, Shops, Tennis, Water sports, Children and Teen programs, Spa, Fitness Center, and Salon



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Restaurants and Lounges:

Colt & Alison (at the Lodge)– A classic American steakhouse (Jacket, collared shirt, slacks are required for gentlemen and boys over eight);

Tavola – Italian flair and warm Southern charm;

River Bar – Love for French and European style cooking, with a modern, creative touch that meet today’s desire for lighter, healthier food (Collared shirt after 5pm);

Oak Room – Relaxed tavern setting featuring Southern favorites and signatures dishes;

Southern Tide - Oceanside overlooking the dunes of Sea Island Beach featuring fresh coastal seafood with a modern, Southern approach; David Love Grill – Laid back dining and features the Sunday Southern Buffet;

Pool House at the Lodge - Breakfast and Grab n’ Go offerings.

Georgian Rooms- Classic American grill or lounge experience servicing sushi. Upscale but fun, intimate and elevated but lively.



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Sea Island: Sea Island is the most beautiful and charming island located on the coast of southeastern Georgia. Before even crossing the bridge onto the island, you will fall in love with this area of the country. As soon as you cross onto Sea Island, you will be spoiled by nearly every member of the Sea Island team. You will feel like royalty from the moment you step on the island to the minute you leave. If there is anything you need, the Sea Island staff will happily “make it happen.”

Whether you are taking time off to simply sit back and relax or you are looking for a more upbeat, active vacation, Sea Island truly has an activity for everyone. With three golf courses, five miles of private beach, several pools throughout the property, fitness center, tennis center, yacht club, shooting school, and so much more, there are endless ways to spend your day at Sea Island.

The Sea Island Beach Club could almost be a resort entirely of its own. With five miles of private beach, three sprawling pools, numerous watersports, poolside service, and three dining options, it is a beachside heaven. Whether you prefer lounging by the pool, long walks on the beach, or devouring the freshest seafood, the Beach Club is the place for you.

The resort boasts more than a dozen dining options throughout the property ranging from casual to fine dining.

What’s a vacation without a little shopping? Sea Island has many shops of its own on the property, but a favorite store in the area is the *Tibi Outlet* on neighboring *St. Simons Island*.



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**NTI 2026 CONFERENCE SCHEDULE
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DATE	MEETINGS	SOCIAL EVENTS/TOURS
8/13 Thursday	Arrival - no meeting scheduled	6:30-7:00pm: Hospitality Desk- Welcome to The Cloister Orientation Meeting
8/14 Friday	7:30am-12:50pm meeting 2026 Individual Tax Update Speaker: Robert Chris Province CPA CPE Hours: 6 Group Live – Taxes	6:00-7:00 pm: Reception hosted by NTI
8/15 Saturday	7:30am-12:50pm meeting: Business Tax Developments- 2026 Speaker: Robert Chris Province CPA CPE hours: 6 Group Live – Taxes	
8/16 Sunday	Day of leisure – no meeting scheduled	
8/17 Monday	7:30am-12:50pm meeting: Family Individual and Business Tax Planning Speaker: Joy Matak, JD, LLM CPE hours: 6 Group Live – Taxes	
8/18 Tuesday	7:30am-12:50pm meeting: Creative IRA, Life Insurance and Retirement Planning Techniques Speaker: Joy Matak, JD, LLM CPE hours: 6 Group Live – Taxes	
8/19 Wednesday	Day of Departure	

Note: Continental breakfast will be served in the meeting room starting at 7:00am for participants only. Participants receive 6 CPEs for attending each live session and can receive additional CPEs (equal to the number of CPEs purchased) by completing optional self-study courses. Self-study materials will be available in modules of 2 CPEs and 4 CPEs (taxation and A&A) and will be distributed either by an on-line downloadable PDF format or distributed at the conference in manual format, at the customer's option.

Summary of CPEs available at this program: Live Group study= 24 CPEs; Self-Study=16 CPEs for a total of 40 CPEs.

CPE BREAKOUT:

Group live CPE (4 days at 6 CPEs per day)	24 CPE hours
Self-study supplement	<u>16 CPE hours</u>
Total CPEs	40 CPE hours

* Distributed either on-site or in a downloadable PDF format

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Who Should Attend: CPAs and other professionals who deal in taxation.

Details on courses: Unless otherwise stated, all courses have the following attributes:

Delivery method: The live segments of the program (6 CPE hours per session) are categorized as Group Live, while the self-study supplement (2 to 4 CPEs per session) is categorized as QAS Self Study.

Program level: Update

Prerequisites: General understanding of taxation (tax courses)

Advance preparation: None

TOPIC DESCRIPTIONS

**Includes Post-Passage Planning
of the OBBBA of 2025**

2026 Individual Tax Update

Objective: To discuss recent developments related to federal income taxation of individuals including new regulations and other changes related to tax reform.

This course focuses on recent 2026 tax developments related to individuals, including tax changes included in new IRS regulations and procedures. Topics include: including new IRS regulations and revenue procedures, practice planning areas, pending changes and tax reform, and more. Recommended CPEs: 6 hours. Field of study: Taxes

Business Tax Developments- 2026

Objective: To address recent developments related to the federal income taxation of businesses.

This course addresses tax issues related to businesses including key matters involving C corporations, S corporations, LLCs and partnerships. Topics include: a reassessment the choice of entity, recent regulations and guidance related to pass-through entities, planning for expiring tax provisions, pending changes and tax reform involving businesses, and more. Recommended CPEs: 6 hours. Field of study: Taxes

Family Individual and Business Tax Planning

Objective: To review tax planning opportunities for families and their businesses.

This course discusses the tax ramifications of the family united and apart. While the nuclear family remains the center point of society, today it is under tremendous economic and social pressure. This course is designed to cover “hot” topics that have a direct impact on the practitioner who represents any client with family issues.

Topics include: Tax planning for children including education funding alternatives, IRAs for children, compensating children in the family business, advance use of life insurance for children, financial planning documents for colleges;

Planning issues for blended families and alternative lifestyles; Business succession planning for the family business including: structuring buy-sell agreements among family members, corporate redemptions and IRC 303 in death, Using IRC 1202 stock and 741 for partnerships. IRC 754 step ups in family situations, and equitable

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family business division considerations; Protecting the family business from the future in-law including pre-marital and post-marital agreements spendthrift trust provisions, and divorce-peculiar transactions; Family philanthropy and charitable giving including a comparison of donor advised funds vs. private foundations; Family continuity issues following death of a member; Helping a kid buy a house and tax implications; Unraveling or modifying family trusts that don't work anymore; Intra-family loans and tax implications, and more. Recommended CPEs: 6 hours. Field of study: Taxes

Creative IRA, Life Insurance and Retirement Planning Techniques

Objective: To review tax planning opportunities for IRAs and retirement planning.

We are all (including tax practitioners) getting older, and the need for effective retirement planning has never been greater. This course is essential for participants who wish to attain maximum value from effective tax planning for IRAs, life insurance and other retirement-related assets. Topics include: The psychology of retiring; tax investment diversification for different types of IRAs, separated between taxable and non-taxable investment options; RMD and QCD planning techniques; planning for traditional and Roth IRAs including advanced Roth Conversion strategies, backdoor Roth IRA planning, and rollovers; Maximizing Roth contributions for children; use of self-directed IRAs; Mega Roth Contributions; incorporating longevity insurance and life insurance into a retirement plan; selling old life insurance policies, and more. Recommended CPEs: 6 hours. Field of study: Taxes

ACCOUNTING AND AUDITING CPE: If you need accounting and auditing credits, we offer numerous self-study courses that qualify for accounting and auditing credit hours.

SPEAKER BIOGRAPHIES:**Robert Chris Province, CPA**

CPA in private practice for over 30 years with a nationwide client base. In addition to his thriving tax practice, he is a national lecturer in CPE for both the accounting and banking industries. He is a former partner at a national CPA firm and has served as an adjunct professor of accounting and tax at various universities around the country, is a past member of the both the AICPA national committee on S-Corporations and the Qualifications Committee for the California Board of Accountancy. He is a licensed CPA in California, North Carolina, and Texas. He earned a B.S. degree in accounting/finance from California State University, Northridge.

Joy Matak, JD, LLM

Partner at Avelino Law, LLP in the firm's Private Client Services practice group. With over two decades of diversified experience as a wealth transfer strategist, Joy has an extensive background in recommending and implementing advantageous tax strategies for multigenerational wealth families, owners of closely held businesses, and high net worth individuals. Adept at navigating the intricate landscape of estate and business succession, Joy crafts customized wealth transfer strategy plans to accomplish even the most complicated estate and business succession goals. She also performs tax compliance work including gift tax, estate tax, and income tax returns for trusts and estates as well as consulting services related to transfer tax planning, asset protection, life insurance structuring, and post-mortem planning. A sought-after resource in her field, Joy frequently shares her insights through speaking engagements for the ABA Real Property, Trust and Estate Law Section; Wealth Management Magazine; the Estate Planning Council of Northern New Jersey; and the Society of Financial Service Professionals. Joy is a regular, monthly contributor to *Trusts & Estates* magazine and has authored and co-authored articles for the *Tax Management Estates, Gifts and Trusts (BNA) Journal*; Leimberg Information Services, Inc. (LISI); and *Estate Planning Review The CCH Journal*, among others, on a variety of topics including wealth transfer strategies, income taxation of trusts and estates, and business succession planning. Joy co-authored a book on the 2017 tax reforms entitled *Estate Planning: Estate, Tax and Other Planning after the Tax Cuts and Jobs Act of 2017*.

**Conference Fee
Discount
By June 30, 2026**

CPE Pricing:

	Up to 24 CPEs	Up to 32 CPEs	Up to 40 CPEs
By June 30, 2026	\$2,297	\$2,398	\$2,499
After June 30, 2026	\$2,397	\$2,498	\$2,599

Cost includes all materials, continental breakfast at each session, (for participants only), and a sunset cocktail reception for you and your family.

Group discounts: 10% for 3 or more participants
20% for 5 or more participants

Conference Cancellation Policy: Conference fee will be refunded in full only if notice is received in writing **on or before May 1, 2026**. With respect to a cancellation occurring **after May 1, 2026**, no conference fee refund shall be granted but credit will be given toward a future conference. This policy applies to the conference fee only and not to hotel costs.

For more information regarding concerns and administrative policies, please go to our website: www.nticpe.com or contact our office at 888-515-3674 (Extension 1).

Licensing Designations:

NTI is registered with the National Association of State Boards of Accountancy (NASBA), as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors through its website: www.learningmarket.org. NTI NASBA Sponsor Number: 103075

NASBA Requirements: In accordance with the new NASBA Registry standards, all self-study credit hours are determined based on a 50-minutes-per-CPE-hour measurement and have required feedback questions throughout the course. Credit measurements may vary from state to state. Your State Board of Accountancy makes the final determination of CPE credits. The self-study portion of the courses must be completed within one year of the conference dates.

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Enrolled Agents: NTI has entered into an agreement with the Office of Professional Responsibility, Internal Revenue Service, to meet the requirements of 31 Code of Federal Regulations, section 10.6(g), covering maintenance of attendance records, retention of program outlines, qualifications of instructors, and length of class hours. This agreement does not constitute an endorsement by the Office of Professional Responsibility as to the quality of the program or its contribution to the professional competence of the enrolled individual.

CPE credits earned by enrolled agents directly to the IRS in accordance with the IRS requirements for CPE providers. Enrolled agents must provide us with their PTIN number so that we may report CPE directly to the IRS.

IRS Approval information: Provider Number: BTYZG

CFPs: NTI is registered with the Certified Financial Planner Board of Standards, Inc.

CLE: Tax courses qualify for CLE in most states. CLE credit is granted on a scale of 60 minutes per hour versus 50 minutes for CPE. Please ask for details.

How to Register: THE CLOISTER, AUGUST 13-19, 2026

CALL 888-515-3674 (Extension 1), fax to 888-552-9749 (or email conferences@nticpe.com) and register by credit or debit card (MC/VISA) or check. Please return this form to the address at the bottom of the page.

REGISTRATION FORM

First and last name _____ Spouse/companion's name(s) _____

Address _____

City/Town _____ State _____ Zip Code _____

Telephone _____ Facsimile _____ Email address _____

CONFERENCE INFORMATION

Check one:	By June 30, 2026	After June 30, 2026	Cost includes all materials, continental breakfast at each session, (for participants only), a cocktail reception for you and spouse/guest.
_____ 40 CPEs	\$2,499	\$2,599	
_____ 32 CPEs	\$2,398	\$2,498	
_____ 24 CPEs	\$2,297	\$2,397	

Days you are attending: (check all that apply):

Please check	Date	Topic
_____	8-14-26	2026 Individual Tax Update (6 CPEs-Group Live-Taxes)
_____	8-15-26	Business Tax Developments-2026 (6 CPEs-Group Live-Taxes)
_____	8-17-26	Family Individual and Business Tax Planning (6 CPEs-Group Live-Taxes)
_____	8-18-26	Creative IRA, Life Insurance and Retirement Planning Techniques (6 CPEs-Group Live-Taxes)

HOTEL INFORMATION

Please fill in:	(Nights of August 13-18, 2026) (departure on August 19, 2026)	Please check	(7 days/6 nights) (Per Person) Double Occupancy
	Arrival date: _____		
Departure date: _____			
Requested bedding type: Please check:	<u>Room category</u>		<u>Package Cost **</u>
One king bed _____	The Cloister Garden Wing	_____	\$2,619
Two queen beds _____	River View King	_____	\$2,969
	Beach Club Ocean View	_____	\$3,328
	River View One-Bedroom Suite	_____	\$3,569
	Frederica River View One-Bedroom Suite	_____	\$3,969
	Note: Hotel package costs are subject to change without notice.		
** Total cost per room, multiply the package cost by 2.	Cost of extra nights and additional persons: Please call for details.		
	Hotel package payment: \$500 per person due with this reservation:		
	Balance due: May 1, 2026.		

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REGISTRATION FORM (CONTINUED)- CLOISTER 2026

PAYMENT:

Pay by check
(mail check to address below)

Charge my credit card

MC
 VISA

COST:

Conference fee \$ _____

Hotel deposit # people _____ x \$500 = \$ _____

TOTAL AMOUNT \$ _____

[Balance of hotel package due May 1, 2026]

_____ Card number

_____ Exp date

_____ Code

State(s) for which CPE is required: _____

I am a: CPA Atty
 PA Other
 CFP
 EA (PTIN _____)

I work in: Public accounting Industry Other _____

SELF-STUDY PACKET:

Participants receive 6 CPEs for attending each live session and can receive additional CPEs (equal to the number of CPEs purchased) by completing optional self-study courses. Self-study materials will be available in modules of 2 CPEs and 4 CPEs (taxation and A&A). Summary of CPEs available at this program: Live Group study= 24 CPEs; Self-Study= 16 CPEs for a total of 40 CPEs.

Please tell us how you would like to receive your self-study materials: (CHECK ONE)

On-line access to self-study courses in a downloadable PDF format
 Distribute self-study courses to you on-site at the conference

FULL REFUND OF ALL CHARGES ON OR BEFORE MAY 1, 2026

Hotel Cancellation: Refunds for hotel cancellations will be made, **IN FULL**, if cancellation is made in writing **on or before May 1, 2026**. **No hotel refunds after May 1, 2026**. Any cancellations on or before May 1, 2026 must be made in writing and emailed to conferences@nticpe.com or faxed to [888-552-9749](tel:888-552-9749). No refunds for early departures.

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On May 1, 2026, I authorize NTI to charge my credit card noted above for the balance of the hotel package.

Signed: _____

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Email this form to: conferences@nticpe.com, or
Mail this form to:

NTI Conferences, PO Box 375, Burlington, MA 01803

For more information, please visit our website at: www.nticpe.com.

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