



NTI 2026 GRAND CAYMAN CONFERENCE

KIMPTON SEAFIRE RESORT & SPA
Grand Cayman
November 8-15, 2026



**NTI 2026 CONFERENCE PROGRAM
KIMPTON SEAFIRE RESORT & SPA
GRAND CAYMAN
NOVEMBER 8-15, 2026**

- Location:** **KIMPTON SEAFIRE RESORT & SPA**
60 Tanager Way, Grand Cayman KY1-1303 Grand Cayman Islands
Phone: 1-(345) 746-4000. Visit: www.kimptonseafireresortandspa.com
- Airport:** Owen Roberts International (GMC0 Hotel direction: 4 Miles)
- Transfers:** Taxi service is available outside the baggage area at the airport. Cost is approximately \$30-\$35. Directions: Visit www.kimptonseafiresortandspa.com
- Weather:** Average high 80 degrees; average low of 81 degrees with a median of 83 degrees.
Area information: www.caymanisland.ky
- Passport Info:** The U.S. State Department and the Department of Homeland Security state that all travelers entering or re-entering the U.S. from the Caribbean will be required to carry passport. For additional passport info visit: www.travel.state.gov

KIMPTON SEAFIRE RESORT & SPA– 8-Day-7-Night Package

Kimpton Seafire's open-air design stays with you indoors and out, with water vistas at every turn, winding gardens that lead to secret sanctuaries, social gathering places, pristine pools and of course, the Caribbean Sea. Enjoy front-row seats to glorious sunsets that seem to set the ocean ablaze. Thus, the name Seafire. Their elevated perch 24 feet above sea level treats you to views of turquoise waters and sun-bleached sands. Each room has its own private balcony, nearly all featuring water vistas. You'll also find three distinct dining destinations, boundless beach activities, two seaside pools, gorgeous gardens and the warm spirit of Grand Cayman.

Check-in: 4:00pm

Check-Out: 12:00am (Surcharges may apply for late checkouts)

Hotel Rating: Forbes 5-Star

Parking: Free daily self-parking and valet parking with in/out privileges included.

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



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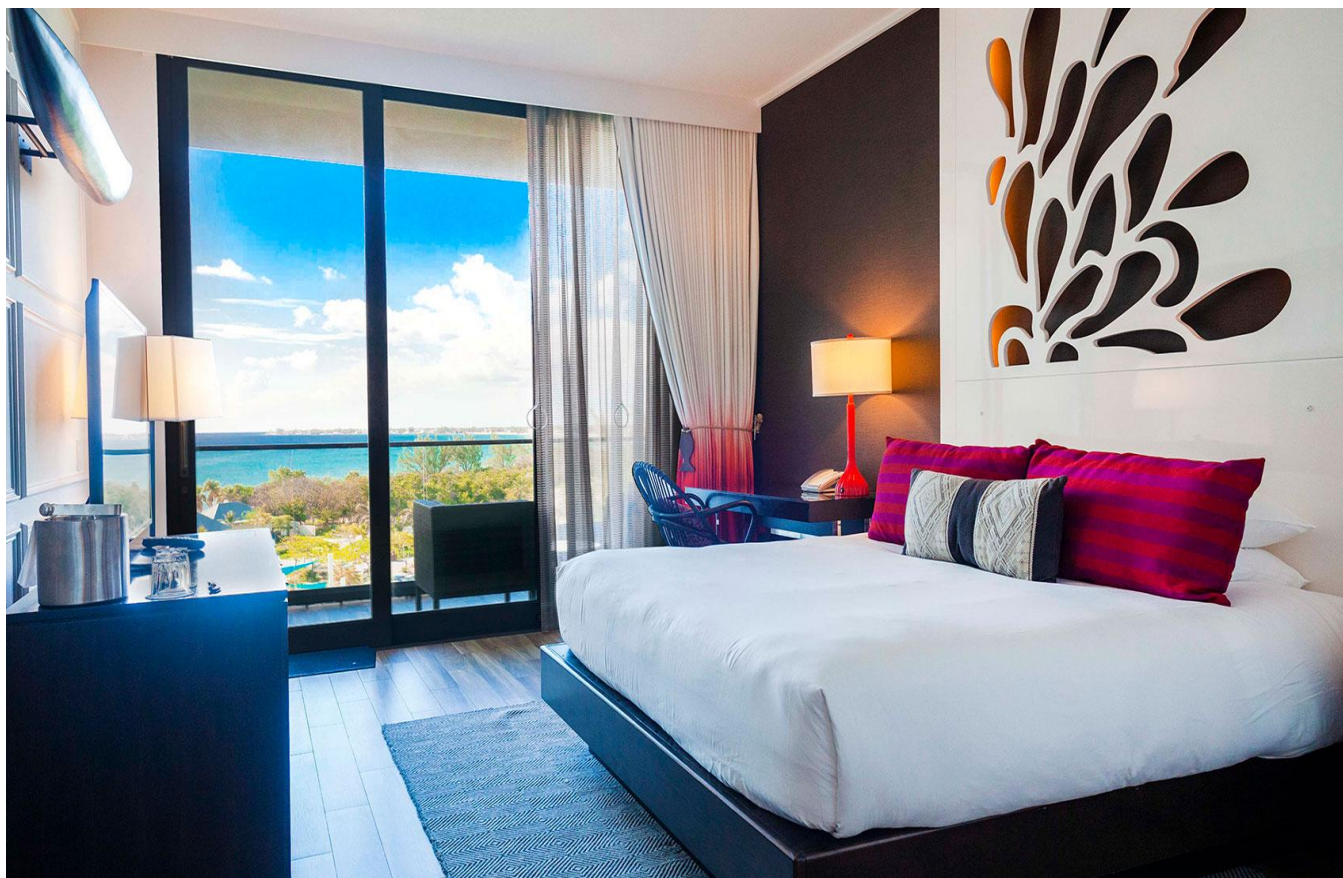
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Accommodations:

The majority of Kimpton's guest rooms offer ocean views through floor-to-ceiling windows, and all have private balconies. Inside, calming neutrals and bursts of tropical color surround you, along with triple-sheeted Frette linens, extravagant baths and other contemporary luxuries.

Partial Oceanview with Balcony Angled partial ocean view, featuring king or 2 queen beds, a spa-style bathroom and private furnished balcony. Approximately 441 SF. Maximum: King bed- 2 persons, Two queen beds- 4 persons. **ONE ROOM REMAINING.**

Premium Oceanview with Balcony Wake up to ocean views, featuring king or 2 queen beds, a spa-style bathroom and private furnished balcony. Approximately 441 SF. Maximum: King bed- 2 persons, Two queen beds- 4 persons. **ONE ROOM REMAINING.**



One-Bedroom Ocean Suite: SOLD OUT

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Hotel Package includes:

- 7-night hotel accommodations
- All hotel room taxes and resort fee.

Resort fee The hotel package includes a daily resort fee for the following complimentary items:

Water sports toys including kayaks, standing paddle boards, water tricycle, floating rafts, and sail boat, Snorkeling gear from our water sports experts, Red Sail Sports, Daily fitness classes; beach yoga, Boxfit, paddle board yoga, and Beachfit, Complimentary dining for children under 5 in main restaurant or beach restaurant, Complimentary access to the Splash at Seafire waterpark for ages 4 – 12, Valet Parking. The Hotel will provide a public complimentary hosted evening wine hour, morning coffee and tea, and Wi-Fi for use in guestroom or public spaces.

Extra Third/Fourth Person Charge: Please ask for details. Extra nights and single rates: Please ask for details. **NO REFUNDS FOR EARLY DEPARTURES**

HOTEL PACKAGE COST- 8 DAYS/7 NIGHTS (Nights of November 8-15, 2026 Departure on November 16, 2026)	
<u>Room category</u>	(Per Person) Double Occupancy <u>Package Cost**</u>
Partial Ocean View with balcony ONE ROOM REMAINING	\$2,907
Premium Ocean View with balcony ONE ROOM REMAINING	\$3,994
One-Bedroom Ocean Suite with balcony	SOLD OUT
** Total cost per room, multiply the package cost by 2. Note: Hotel package costs are subject to change without notice.	

HOTEL PACKAGE PAYMENT:

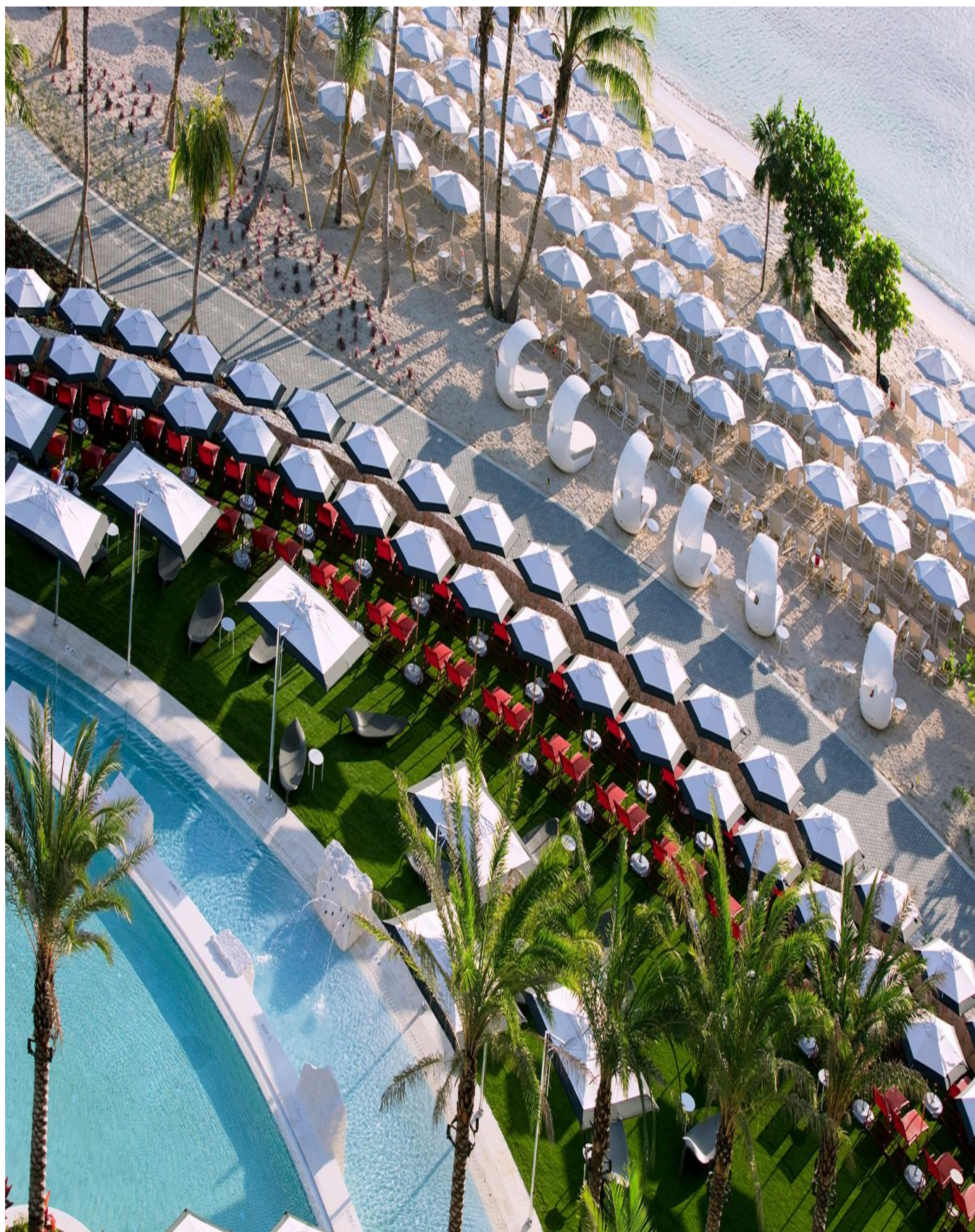
Full payment due at time of reservation.

Hotel Cancellation: Refunds for hotel cancellations will be made, **IN FULL**, if cancellation is made in writing **on or before August 1, 2026. No hotel refunds after August 1, 2026.** Any cancellations on or before August 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:

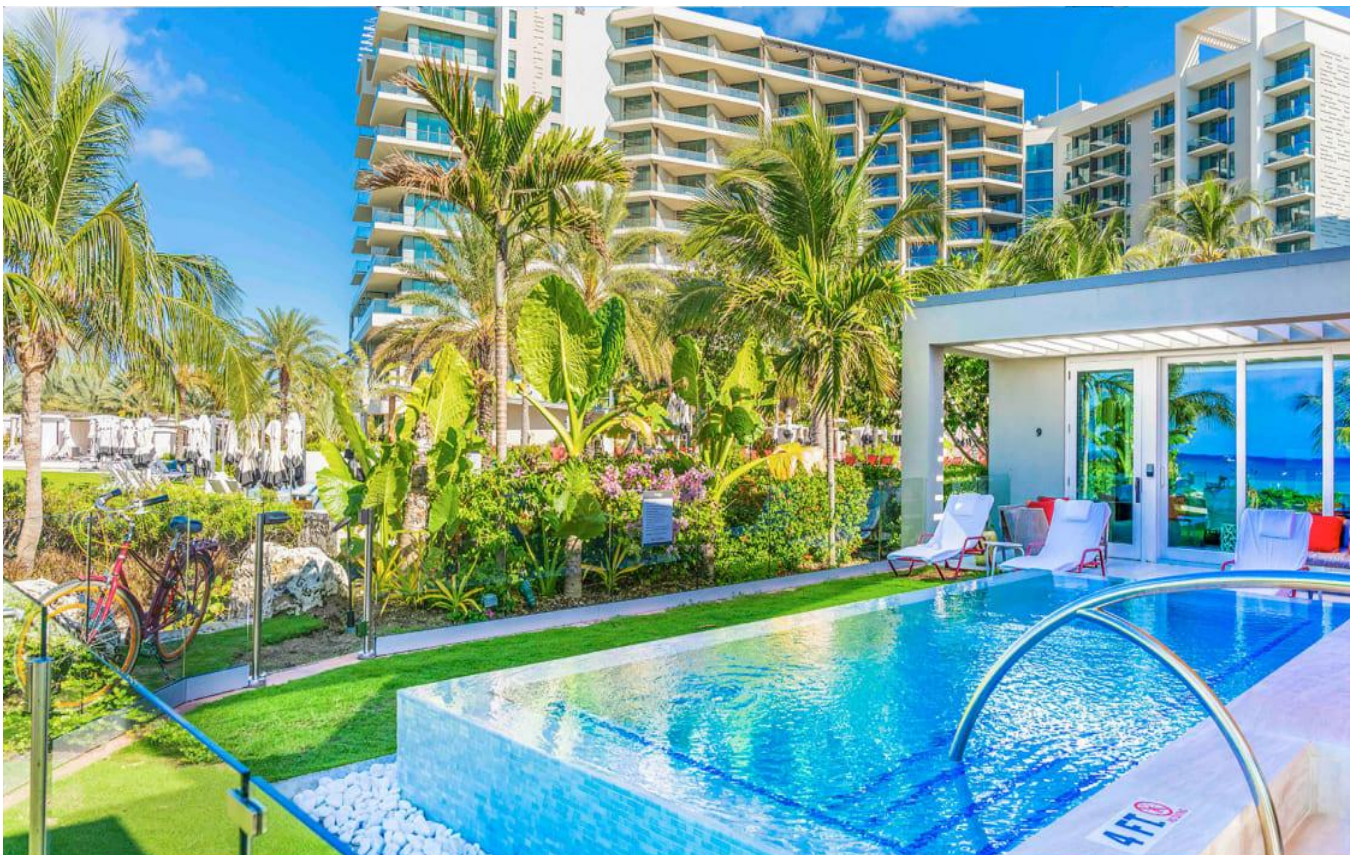
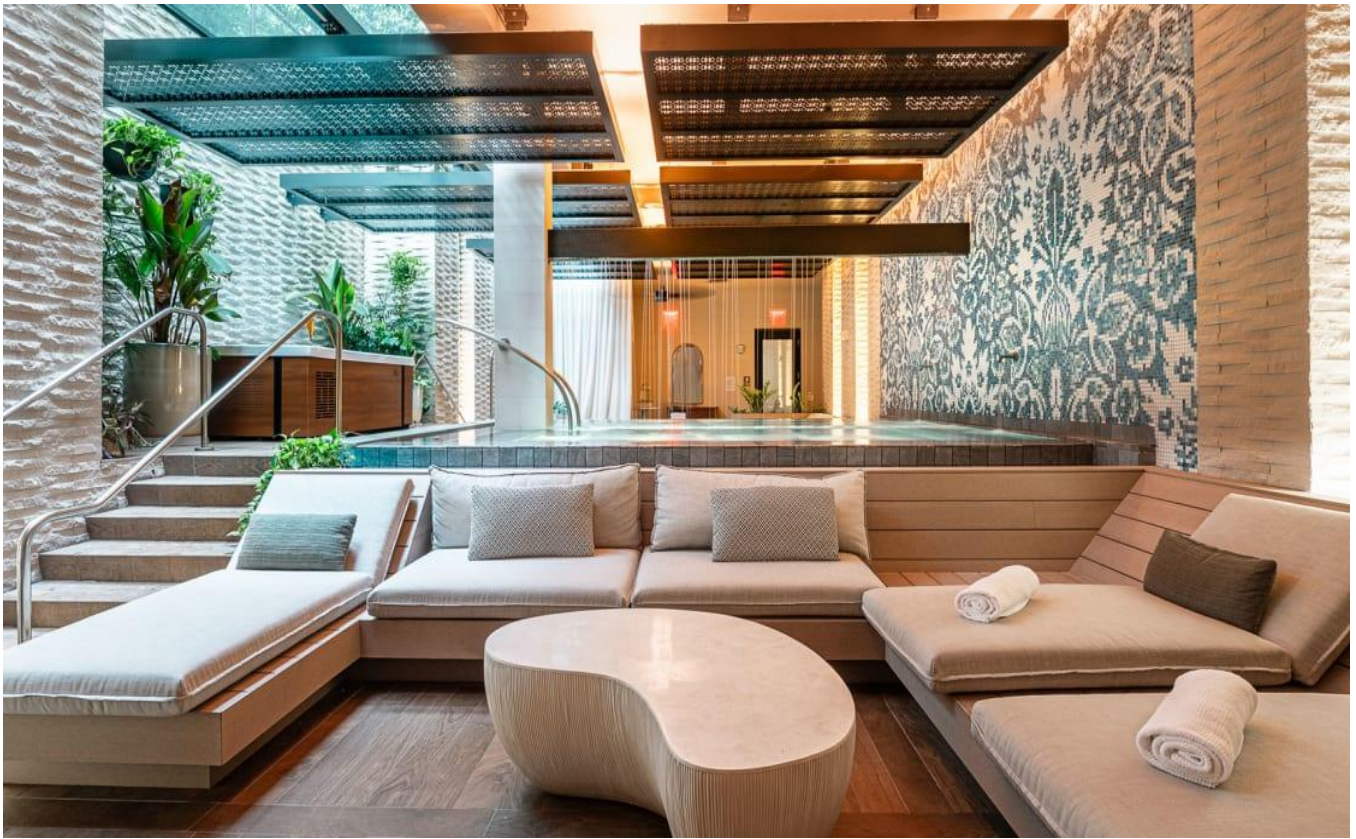
Include: Yoga mat in every room free of charge, on-site boutique with Grand Cayman souvenirs, clothing and beach necessities, complimentary morning coffee and tea in lobby, complimentary newspapers and hosted evening social hours.

The SPA at Seafire

The Spa at Seafire welcomes you to a beautifully imagined wellness experience. Discover private sanctuaries, transformative treatments, and a haven created for pure rest and renewal. Enjoy our tranquil relaxation lounge and opulent private treatment suites, or unwind in the spa garden before sinking into the jacuzzi or cold plunge. Purify in the steam room, or indulge in the island's only Hammam Room for a deeply cleansing and grounding experience. Complement your wellness ritual with a visit to our full-service Salon, where expert stylists and therapists offer hair services, manicures, pedicures, and beauty treatments designed to leave you polished and refreshed.



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Restaurants and Lounges:

Ave – Vibrant cuisine of the Mediterranean meets the bounty of Grand Cayman’s land and waters at Seafire’s main restaurant. Savor breakfast, dinner or Sunday brunch – inside for outdoors.

Avecita - Offers nightly tasting menu with a culinary tour de force. Enjoy a modern Spanish tapas-style menu.

Library by the Sea – Grand Cayman’s premier specialty cocktail bar. By night, they offer a curated list of expertly crafted cocktails.

Nana Cabana – Vibrant poolside bar, service refreshing cocktails, cold beers and light tropical bites just steps from Seven Mile Beach

The Pantry at Seafire – Enjoy specialty coffee drinks and fruit smoothies, plus pastries, croissants and other fresh baked goods. Heading over to Rum Point for a picnic? Enjoy cafe-style sandwiches, salads and more.

Cocoloba – Part Mexican street taco joint, part beach hut, our on-the-beach restaurant places you mango-throwing distance from the water. A creative menu, happy hour and ocean views conspire to keep you hanging out at this open-air oasis all day long.



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Grand Cayman:

Nestled in the calm turquoise waters of the western Caribbean, lies the peaceful Cayman Islands. This island paradise offers spectacular natural beauty, a wealth of activities including an abundance of water sports and a vast amount of historical and ecological points of interest. Explore a sunken wreck, dance the night away, go duty-free shopping or explore the island – Cayman is the place to be.

Suggested Activities:

Duty-free shopping – Island Tour – Seven Mile Beach – Snorkel excursion – Stingray City – Sunset Sail – Turtle Farm – Scuba diving – Queen Elizabeth II Botanic Park – Butterfly Farm – Day trip to Cayman Brac or Little Cayman – Famous town of “Hell” – Excursion to Rum Point – Bird watching – Cayman Craft Market – Tennis – Pirate Cruise – Golf – Atlantis Deep Dive Submarine – Dining at any island restaurants.



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**NTI 2026 CONFERENCE SCHEDULE
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DATE	MEETINGS	SOCIAL EVENTS/TOURS
11/08 Sunday	Arrival - no meeting scheduled	6:30-7:00pm: Hospitality Desk Welcome to Grand Cayman Orientation Meeting
11/09 Monday	7:30am-12:50pm meeting 2026 Individual Tax Update Speaker: James D. Brandenburg, CPA, MST CPE Hours: 6 Group Live – Taxes	6:00 – 7:00pm: Cocktail reception hosted by NTI
11/10 Tuesday	7:30am-12:50pm meeting: Business Tax Developments-2026 Speaker: James D. Brandenburg, CPA, MST CPE hours: 6 Group Live – Taxes	
11/11 Wednesday	Day of leisure – no meeting scheduled	
11/12 Thursday	Day of leisure – no meeting scheduled	
11/13 Friday	7:30am-12:50pm meeting: Family Individual and Business Tax Planning Speaker: Joy Matak, JD, LLM CPE hours: 6 Group Live – Taxes	
11/14 Saturday	7:30am-12:50pm meeting: Creative IRA, Life Insurance and Retirement Planning Techniques Speaker: Joy Matak, JD, LLM CPE hours: 6 Group Live – Taxes	
11/15 Sunday	Recommended 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*

16 CPE hours

Total CPE

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” tax and financial issues that affect our clients and their families.

Topics include: Tax planning for children including IRAs for children, advance use of life insurance for children, planning documents for colleges, and helping children make large purchases such as buying homes.

Planning issues for blended families and alternative lifestyles; Business succession planning for the family business including: getting the business ready for sale/transfer to the next generation, structuring buy-sell agreements, equal vs. equitable dispositions of family businesses and other assets among family members.

Unique planning opportunities for IRC 1202 stock and maximizing IRC 754 step up adjustments; Protecting the family business from the future in-law including pre-marital and post-marital agreements, spendthrift trust

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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; 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: separated 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:**James D. Brandenburg, CPA, MST**

Partner with the national CPA firm of Sikich, with extensive experience and knowledge in corporate and partnership tax law, mergers and acquisitions and tax legislation. Mr. Brandenburg has particular expertise working with owners of closely held businesses to identify tax planning opportunities and assist them in implementing these strategies including tax planning and reporting for manufacturers, distributors and contractors, International tax consulting and compliance, LIFO inventory planning, analysis and implementation, Interest charge DISCs planning, analysis and reporting, and Foreign bank and investment account reporting and compliance, among others. He has also been a national lecturer on taxation to accountants and attorneys.

Joy Matak, JD, LLM

Partner in Brach Eichler, LLC's Trust and Estate 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*.

CPE Pricing:

	Up to 24 CPEs	Up to 32 CPEs	Up to 40 CPEs
Conference fee	\$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 August 1, 2026**. With respect to a cancellation occurring **after August 1, 2026**, no 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.



**APPROVED
CONTINUING EDUCATION
PROVIDER**

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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: GRAND CAYMAN, NOVEMBER 8-15, 2026

Kimpton Seafire Resort & Spa

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:

☐ 40 CPEs
☐ 32 CPEs
☐ 24 CPEs

Conference fee

\$2,599
 \$2,498
 \$2,397

Cost includes all materials, continental breakfast at each session, (for participants only), a cocktail reception for you and spouse/guest.

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

Please check	Date	Topic
☐	11-09-26	2026 Individual Tax Update (6 CPEs-Group Live-Taxes)
☐	11-10-26	Business Tax Developments-2026 (6 CPEs-Group Live-Taxes)
☐	11-13-26	Family Individual and Business Tax Planning (6 CPEs-Group Live-Taxes)
☐	11-14-26	Creative IRA, Life Insurance and Retirement Planning Techniques (6 CPEs-Group Live-Taxes)

HOTEL INFORMATION

Please fill in:

Arrival date: _____

Departure date: _____

Bedding: please check:

One king bed _____
 Two queen beds _____

Cost of extra nights and additional persons:
Please call for details

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

**(Nights of November 8-14, 2026)
(departure on November 15, 2026)**

**(8 days/7 nights)
(Per Person)**

Double Occupancy

Room category	Please check	Package Cost**
Partial ocean view with balcony	☐	\$2,907
Premium ocean view with balcony	☐	\$3,994
One-bedroom ocean suite	☐	SOLD OUT

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

Hotel package payment: Full payment due at time of reservation.

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REGISTRATION FORM (CONT)- GRAND CAYMAN 2026

PAYMENT:

☐ Pay by check
(mail check to address below)

☐ Charge my credit card

☐ MC
☐ VISA

Card number

Exp date

Code

COST:

Conference fee \$ _____

Hotel deposit **FULL PAYMENT DUE** \$ _____

TOTAL AMOUNT \$ _____

[Balance of hotel package due at time of reservation]

State(s) for which CPE is required: _____

I am a (an): ☐ CPA ☐ Atty
☐ PA ☐ Other
☐ CFP

I work in: ☐ Public accounting ☐ Industry ☐ Other _____

☐ EA (PTIN _____)

SELF-STUDY PACKET:

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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

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I authorize NTI to charge my credit card noted above for the balance of the hotel package.

Signed: _____

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Please: Fax this form to 888-552-9749, or

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

Mail this form to: NTI Conferences, P.O. Box 375, Burlington, MA 01803

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

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