



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

**NTI 2026 CONFERENCE
MAUI, HAWAII**

***FOUR SEASONS RESORT
MAUI at WAILEA***

DECEMBER 6-13, 2026



**NTI 2026 CONFERENCE PROGRAM
FOUR SEASONS RESORT MAUI
MAUI, HAWAII
DECEMBER 6-13, 2026**

Location: **FOUR SEASONS RESORT MAUI**
3900 Wailea Alanui drive, Wailea, HI 96753 (808) 874-8000

Website: www.fourseasons.com/maui

Airports: Kahului Airport (OGG) – approximately 30 minutes from hotel

Transfers: Taxi service is available outside the baggage area at the airport.

Weather: Average high 85°; average low of 70°

Area Info: Visit: www.mauichamber.com

Four Seasons Resort Maui at Wailea – 8-Day/7-Night Package

Overlooking the gentle waters of Wailea Beach, is the luxurious Four Seasons Resort Maui, with its ever-attentive hotel staff and the largest luxury resort guest rooms and suites on the island, epitomizes a classical Hawaiian palace resort. On the sunny side of Maui island, graced with near-perfect weather, Four Seasons Resort Maui sites above on the golden crescent of Wailea Beach. The resort is designed with angled guest rooms to give as many rooms as possible an ocean view. A stroll through fragrant plumeria trees and art-laden public areas reveal a study in relaxed elegance.

Check-in: 3:00pm **Check-out:** 12:00pm (Surcharges may apply for late checkouts)
Hotel Rating: AAA 5-Diamond **Parking:** \$50 per night plus tax (subject to change)



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

Accommodations:

Four Seasons Resort Maui at Wailea offers Maui's largest guest rooms and suites, as well as the Island's largest hotel bathrooms.

In-Room Amenities: Legendary Four Season's mattresses, a sitting area, oversized marble bathroom, with deep soaking tub, separate shower and double-basin vanity, and private lanais with garden or ocean views depending on room type. The hotel offers daily housekeeping and nightly turn-down service, wireless internet, 24-hour full in-room dining, and in-room safes. Rooms also have a MyBar area with refrigerator, tea setup and Nespresso machine, 65-inch TV with Chromecast streaming capabilities



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Garden View: Approximately 600 square feet plus lanai located on the lower floors. Garden View rooms feature either one king or two queen bedding, and have views of the hotel's beautifully manicured indigenous gardens, coconut trees and surrounding foliage.. King bed sleeps 3 adults, or 2 adults and 2 children. Two queen beds sleeps: 4 adults, or 2 adults and 2 children



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Ocean View: Approximately 600 square feet plus lanai located on middle to upper floors. Ocean View rooms feature either one king or two queen bedding, and have angled views of the Pacific Ocean from the lanai and interior of the room.. **LIMITED AVAILABILITY.**



**CALL 888-515-3674 (Extension 1) or FAX 888-552-9749 or
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Oceanview One-Bedroom Suite: Approximately 1,400 square feet plus lanai located on middle to upper floors. King bed with customizable Four Seasons mattress. Configurable space, large outdoor living area and a MyBar area with marble countertop. One full marble bathroom, plus guest 3/4 bathroom with shower. Room has views of the Pacific Ocean and the formal sculpture garden. Sleeps 4 adults, or 2 adults and 3 children under age 18. **LIMITED AVAILABILITY**



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Oceanview One-Bedroom Suite:



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Hotel Package includes: 7-night hotel accommodations including all taxes. Third Person charge: \$100 per night plus tax (subject to change). Children 18 and under are complimentary when sharing with two paying adults using existing bedding. Charges for roll-a-ways and cribs may apply. Housekeeping service and bellman fees are not included and are discretionary. Extra nights and single rates: Please ask for details. ***NO REFUNDS FOR EARLY DEPARTURES.***

ROOM UPGRADES
Oceanview
Oceanview One-Bedroom Suite
(Limited Availability)

HOTEL PACKAGE COST- 8 DAYS/7 NIGHTS

<u>Room category</u>	(Per Person) Double Occupancy <u>Package Cost**</u>
Garden View	\$2,994
Ocean View- limited availability	\$3,880
Ocean View One-Bedroom Suite- SOLD OUT AT THIS PRICE	\$5,582
** 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 SEPTEMBER 1, 2026

HOTEL PACKAGE PAYMENT:

With reservation:	\$500 per person (see reservation form below)
September 1, 2026	Balance Due

Hotel prices are subject to change prior to making reservations.

Hotel Cancellation: Refunds for hotel cancellations will be made, **IN FULL**, if cancellation is made in writing **on or before September 1, 2026**. **No hotel refunds after September 1, 2026**. Any cancellations on or before September 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 Four Seasons features 3 top-rated restaurants, 3 shopping boutiques, 3 salt-water pools (Serenity, Fountain, and Waterfall,) 58 cabanas across the resort, 4 bars, 3 golf courses (Wailea Blue, Gold and Emerald,) 2 tennis courts, a spa with 13 treatment rooms, 3 ocean-side Hales (thatched huts,) 4 signature treatments, and couple and family activities, along with childcare.



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Restaurants and Lounges: The Four Seasons offers the following restaurants: Spago, Ferraro's Bar e Ristorante, and DUO Steak and Seafood. They also feature Beachwalk Café and Lobby Lounge



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Wailea, Maui: Surrounded by championship golf courses, mountains, pineapple fields and blessed with white sand beaches, the Hawaiian Island of Maui's diversity is revealed around every bend and beyond every rainbow. Drive up to the moon-like crater at the summit of *Haleakala* or bicycle down the summit for dramatic views. Travel the winding road to *Hana*, past waterfalls and tropical. Maui's natural wonders never cease.

Suggested Activities: "Road to Hana" – Atlantis Submarine – Kahului – Maui Tropical Plantation – Whaler's Village – Golf – Haleakala National Park – Maui Ocean Center – Pacific Whale Foundation – Hawaii Nature Center – Whale Watch– Luau – Maui Coffee Farms.





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NTI 2026 CONFERENCE SCHEDULE
FOUR SEASONS MAUI RESORT at WAILEA
MAUI, HAWAII
DECEMBER 6-13, 2026

DATE	MEETINGS	SOCIAL EVENTS/TOURS
12/6 Sunday	Arrival - no meeting scheduled	6:30-7:00pm: Hospitality Desk Welcome to Maui Orientation Meeting
12/7 Monday	7:30am-12:50pm meeting 2026 Individual Tax Update Speaker: Thomas E. Bayer, CPA, CExP CPE Hours: 6 Group Live – Taxes	6:00-7:00 pm: Reception hosted by NTI
12/8 Tuesday	7:30am-12:50pm meeting Business Tax Developments- 2026 Speaker: Thomas E. Bayer, CPA, CExP CPE hours: 6 Group Live – Taxes	
12/9 Wednesday	Day of leisure – no meeting scheduled	
12/10 Thursday	Day of leisure – no meeting scheduled	
12/11 Friday	7:30am-12:50pm meeting Family Individual and Business Tax Planning Speaker: Thomas P. Langdon, JD, LLM, CFA, CFP CPE hours: 6 Group Live – Taxes	
12/12 Saturday	7:30am-12:50pm meeting Creative IRA, Life Insurance and Retirement Planning Techniques Speaker: Thomas P. Langdon, JD, LLM, CFA, CFP CPE hours: 6 Group Live – Taxes	
12/13 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*	<u>16 CPE hours</u>
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" 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 family business

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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:**Thomas E. Bayer, CPA, CExP**

Mr. Bayer has recently become the partner-in-charge of the Indianapolis office of Sikich after spending his entire career serving clients in central Illinois. He has 28 years of experience providing a broad range of accounting, tax, and business advisory services to commercial clients across various industries and Sikich offices.

As both a CPA and Certified Exit Planner (CExP), Tom has specialized expertise in the areas of business succession planning, tax planning and compliance, and business advisory. He puts his business succession planning abilities and knowledge to work firm-wide, serving clients in advisory services across the country. He is a Certified Public Accountant (CPA), a Certified Exit Planner (CExP), and is Certified in Strategic Performance Management (CSPM).

Thomas P. Langdon, JD, LLM, CFA, CFP

Thomas P. Langdon is a professor of Business Law at the Gabelli School of Business, Roger Williams University, and an adjunct professor of taxation at Georgetown University. He is a principal in Langdon & Langdon Financial Services, LLC, a Connecticut based tax planning and preparation firm, and is an attorney admitted to the Connecticut, Pennsylvania, and U.S. Tax Court Bar. He received a BS in finance and an MBA from the University of Connecticut, an MS in Financial Services from The American College, a Juris Doctor (JD) from Western New England College School of Law, and a Master of Laws (LL.M.) in Taxation from Villanova University School of Law. Thomas also holds several designations, including, among others: Chartered Financial Analyst (CFA), CERTIFIED FINANCIAL PLANNER™ (CFP®), Accredited Estate Planner (AEP), Chartered Advisor in Philanthropy (CAP), and Chartered Life Underwriter (CLU). He is also a Fellow of the Life Management Institute. Prior to joining the Gabelli School of Business at Roger Williams University, Mr. Langdon held positions as professor of Taxation at The American College, asset/liability manager for The Travelers Insurance Company Asset Management and Pension Services division, and student law clerk in The United States Federal District Court.

A nationally recognized author of speaker, Thomas has addressed many professional organizations, including the International Association for Financial Planning, The Financial Planning Association (FPA), The Society of Financial Services Professionals, The National Association of Health Underwriters, The National Association of Estate Planners and Councils, and numerous Estate Planning Councils, Bar Associations, CPA Societies, Financial Planning Associations, and local chapters of the Society of Financial Service Professionals (formerly the American Society of CLU and ChFC).

Mr. Langdon has written or co-authored several books, as well as dozens of articles that have appeared in such publications as Financial and Estate Planning Quarterly, Probate and Property. The Probate Practice Reporter, The American Bar Association Small Firm Digest, The Ohio CPA Journal, The Journal of International Taxation, Financial Services Review, The Journal of Financial Planning, The Journal of the Society of Financial Services Professionals, The National Association of Estate Planners and Councils Newsletter, and Best's Review. He has been widely quoted in the business press and has received various awards from the American Bar Association and the Certified Financial Planner Board of Standards for articles he has written. Mr. Langdon's leadership positions include service on the Board of Financial Service Professionals Business and Compensation Planning Section; and Education Committee member of the Financial Analysts of Philadelphia. His community service leadership positions include secretary of the State of Connecticut Task Force on Superfund (CERCLA) Reform; chairman of the Southington (CT) Public Library Board of Trustees; chairman of the Barnes Museum Board of Trustees; and a member of the Southington (CT) Town Council.

**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 September 1, 2026**. With respect to a cancellation occurring **after September 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: MAUI, HAWAII, DEC 6-13, 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,
2026After 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
 _____ 32 CPEs
 _____ 24 CPEs

\$2,499
 \$2,398
 \$2,297

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

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

Please
check

Date

Topic

_____	12-7-26	2026 Individual Tax Update (6 CPEs-Group Live-Taxes)
_____	12-8-26	Business Tax Developments 2026 (6 CPEs-Group Live-Taxes)
_____	12-11-26	Family Individual and Business Tax Planning (6 CPEs-Group Live-Taxes)
_____	12-12-26	Creative IRA, Life Insurance and Retirement Planning Techniques (6 CPEs-Group Live-Taxes)

HOTEL INFORMATION

Please fill in:

Arrival date: _____

Departure date: _____

Bedding type: (please check):

One king bed _____

Two queen beds _____

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

(Nights of Dec 6-12, 2026)

(departure on December 13, 2026)

(8 days/7 nights)

(Per Person)

Double Occupancy

Room categoryPlease
checkPackage Cost**

Garden View _____

\$2,994

Ocean View _____

\$3,880

One-Bedroom Oceanview Suite _____

\$5,582

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

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

Hotel package payment: \$500 per person due with this reservation: Balance due: September 1, 2026.

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 EMAIL: conferences@nticpe.com

REGISTRATION FORM (CONTINUED)- MAUI 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 September 1, 2026]

Card number

Exp date

Code

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

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

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On September 1, 2026, 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.

2-20-26 REV

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