



Conference Fee
Discount By
June 30, 2026

NTI 2026 NAPLES, FLORIDA CONFERENCE

***FOUR SEASONS RESORT
AT THE NAPLES BEACH CLUB
NAPLES, FLORIDA
OCTOBER 25 –31, 2026***



NTI 2026 CONFERENCE PROGRAM
FOUR SEASONS RESORT AT THE NAPLES BEACH CLUB
NAPLES, FLORIDA
OCTOBER 26 –31, 2026

Location: Naples Beach Club- A Four Seasons Resort
851 Gulf Shore Blvd North
Naples, FL 34101

Airports: Southwest Florida International Airport (Ft. Myers) - 26 miles from the property
Naples Regional Airport- small planes (10 minutes)

Transfers: Car rental is recommended

Directions: Visit: www.mapquest.com

Weather: October: Average high: 85° - Average low: 70°

Area Information Visit: www.visitnaplesfl.com

THE FOUR SEASONS RESORT AT THE NAPLES BEACH CLUB, NAPLES, FLORIDA

Join NTI for a conference scheduled at the brand-new five-star **Four Seasons Resort** at the Naples Beach Club, in Naples, Florida, opened in late 2025.

Situated on 1,000 feet of pristine white sands in the heart of Old Naples, the Four Seasons Resort is a rare beachfront gem on Florida's Gulf Coast, with crystal-clear waters. Located on 125 acres in a walkable coastal village, the new 220-room Four Seasons Naples will be the preeminent destination resort in Southwest Florida that will cater to its guests at the highest level with a wide range of amenities and personalized services.

The Hotel will feature a Market Square town center, a spa and well-being center, racquet sports, and five restaurants and bars. Extensive landscaping and gardens throughout the property will create the intimate feel of a singular coastal resort –one that spans from Gulf to golf.

For those seeking retail experiences, the exclusive shops and boutiques at Fifth Avenue South are steps away, providing a plethora of luxury goods.

Location: 32 miles from Southwest Florida International Airport (RSW)- Fort Myers, Florida

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



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Hotel:



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Accommodations:

Experience the best of the Gulf Coast with a collection of luxury accommodations in Naples, Florida. Designed with modern coastal elegance, our guest rooms and suites feature expansive layouts, stylish interiors and private terraces, inspiring the relaxed indoor-outdoor lifestyle of Southwest Florida. Begin your unforgettable oceanfront experience at Naples Beach Club, A Four Seasons Resort.

The guest rooms all have walk-in closets, in-room bar location in the hallway of the room leading to the main guest room with king or two queen beds, all facing sliding glass doors that open to expansive balconies all done in a chic coastal design style. Guestrooms are approximately 532 sq. ft. with master bathrooms that include deep soaking tubs and separate walk-in showers.

Resort View: Room with balcony (approximately 532 sq. ft.) – Rooms feature one king or two queen beds. View of lush landscape and surrounding architecture. Maximum occupancy: three adults or two adults and two children in existing bedding.



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Partial Oceanview: Room with balcony (approximately 532 sq. ft.) – Rooms feature one king or two queen beds. Angled oceanview from the balcony. Maximum occupancy: three adults or two adults and two children in existing bedding. **Limited availability.**

Oceanview: Room with balcony (approximately 532 sq. ft.) – Rooms feature one king or two queen beds. Oceanview from the balcony. Maximum Occupancy: three adults or two adults and two children in existing bedding. **Limited availability.**



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Oceanview One-Bedroom Suite (approximately 1,100 sq. ft): Room with separate bedroom and living room. Oceanview from the balcony or terrace. **Limited availability.**



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Hotel Package includes: 6-night hotel accommodations including all taxes.

An additional charge of \$50 per night plus taxes will be assessed for a third adult (18 years or older). Up to two (2) children (under the age of 18) allowed in existing bedding only.

Extra nights and single rates: Please ask for details. ***NO REFUNDS FOR EARLY DEPARTURES.***

***Special Upgrade Price-
Ocean View One-Bedroom Suite
ONLY ONE AVAILABLE***

HOTEL PACKAGE COST- 7 DAYS-6 NIGHTS

<u>Room category</u>	(Per Person) Double Occupancy <u>Package Cost**</u>
Deluxe Resort View	\$2,195
Partial Ocean View- limited availability	\$2,595
Oceanview- very limited availability	\$3,481
Oceanview One- Bedroom Suites – ONE AVAILABLE	\$4,995
** 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 AUGUST 1, 2026**

HOTEL PACKAGE PAYMENT:

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

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 and Resort Amenities and Services:

The Four Seasons Resort is a rare beachfront gem on Florida's Gulf Coast, with crystal-clear waters and soft white sands.

The Resort features:

- 1,000 ft. of white sand beach
- Two resort pools and spa lap pool
- Market Square town center with casual dining and family-friendly activities
- Five restaurants and bars
- Spa and wellbeing center with 16 treatment rooms, including a couples' suite
- Salon with hair and nail services
- 24-hour fitness center
- Kayaking, paddleboarding, boogie boarding and E-foiling on the gentle wave of the Resort's 1000 foot white-sand beach
- Access to inshore and offshore fishing from Naples Bay to mangrove – lined backwaters to the Gulf of Mexico
- Destination picnics, sunset or cocktail cruises aboard the Resort's 34-foot Hinckley
- Access to E-biking through picturesque and winding old Naples Streets including Fifth Avenue
- Guided exploration of the Everglades National Park, Big Cypress National Preserve and Rookery Bay
- 18-hole Tom Fazio golf course (opening in late 2026)
- Tennis Center and Pro Shop with six Har-Tru Clay Courts (opening late 2026)

Note: The hotel's golf course and tennis center are opening in late 2026. There are numerous other golf courses and tennis facilities available nearby.



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Hotel Dining

Experience refined waterfront dining from five distinct restaurants and bars, ranging from The Merchant Room to relaxing favourites like HB's and Sunset Bar. From Market Square gatherings to oceanfront cocktails, each venue captures the coastal elegance of Old Naples. Four Seasons welcomes you with warm, intuitive service and a stunning beachside setting, perfectly positioned for unforgettable dining and iconic Naples sunsets.

The Merchant Room



HB'S



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Golf



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Sanctuary Spa

Step into Sanctuary Spa at Naples Beach Club, where wellness is both a ritual and a revelation. Spanning 30,000 square feet (2,787 square metres) across two serene levels, this immersive retreat blends advanced therapies with soulful relaxation. Choose from 16 treatment rooms – including three couples' suites – or restore in our thermal circuit with aromatherapeutic steam rooms, Finnish saunas, vitality pools and more. Discover the rooftop lap pool and 24-hour fitness centre curated by celebrity trainer Harley Pasternak. From high-performance facials to innovative recovery treatments, every experience honours the rhythms of coastal life – where luxury and well-being are effortlessly intertwined.



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Naples, Florida:

Naples is a city on the Gulf of Mexico in southwest Florida that's known for luxury shopping, fine dining and golf courses. The Naples Pier, first erected in 1888, is the city's symbol, and is a popular fishing and dolphin-spotting destination. It's flanked by miles of beaches with calm waters and fine white "sugar" sand, including those at Clam Pass Park and Delnor-Wiggins Pass State Park.

Activities:

- Cambier Park offers acres of green space for outdoor concerts and art fairs.
- Naples Pier extends an invitation for sunset strolls and fishing.
- Art enthusiasts can revel in the latest exhibitions at the Naples Art Association or indulge in performances at the Gulfshore Playhouse and the Von Liebig Art Center.
- Culinary adventures await at celebrated local restaurants such as Truluck's Seafood, Steak and Crab House, where the dining experience is as sumptuous as the cuisine.
- Experience the exclusive shops and boutiques at Fifth Avenue South providing a plethora of luxury goods.
- Visit the Naples Botanical Garden, Corkscrew Swamp Sanctuary, Lowdermilk Beach, and the Fifth Avenue South Naples Zoo.
- Play golf at the area's numerous world-class golf courses.



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**NTI 2026 CONFERENCE SCHEDULE
FOUR SEASONS RESORT AT NAPLES BEACH CLUB
NAPLES, FLORIDA
OCTOBER 25- 31, 2026**

DATE	MEETINGS	SOCIAL EVENTS/TOURS
10/25 Sunday	Arrival - no meeting scheduled	6:30-7:00pm: Hospitality Desk Welcome to Naples Orientation Meeting
10/26 Monday	7:30am-12:50pm meeting: Family Individual and Business Tax Planning Speaker: Thomas P. Langdon, JD, LL.M, CFA, CFP CPE hours: 6 Group Live – Taxes	6:00-7:00 pm: Reception hosted by NTI
10/27 Tuesday	7:30am-12:50pm meeting: Creative IRA, Life Insurance and Retirement Planning Techniques Speaker: Thomas P. Langdon, JD, LL.M, CFA, CFP CPE hours: 6 Group Live – Taxes	
10/28 Wednesday	Day of leisure – no meeting scheduled	
10/29 Thursday	7:30am-12:50pm meeting 2026 Individual Tax Update Speaker: Larry Johnson, CPA, MST CPE Hours: 6 Group Live – Taxes	
10/30 Friday	7:30am-12:50pm meeting: Business Tax Developments- 2026 Speaker: Larry Johnson, CPA, MST CPE hours: 6 Group Live – Taxes	
10/31 Saturday	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

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in death, Using IRC 1202 stock and 741 for partnerships. IRC 754 step ups in family situations, and equitable 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:

Larry Johnson, CPA, MST

Larry Johnson is a Certified Public Accountant with more than 30 years experience with Sikich, a Top 40 CPA firm. He holds a B.S from Illinois State University and a Masters in Taxation from Fontbonne College in St. Louis. Mr. Johnson has served a variety of firm tax department leadership roles, including National Director of the Tax Exempt Division. Mr. Johnson has worked heavily with business clients. He has significant experience in planning related to complicated business transactions, including tax exempt organizations. Larry worked in tax representation before the IRS, including working on teams resulting in victories in United States Tax Court. Mr. Johnson was a founding member of the Community Foundation for the Land of Lincoln. He was a member of the National Committee of Planned Giving, serving on the National Leave A Legacy Board of Directors. He has provided governance and leadership training to nonprofit leaders. He has worked extensively in philanthropic planning with high-wealth families, employing a non-traditional values-based approach. For the past 17 years, he has been a national lecturer on taxation to accountants and attorneys.

Thomas P. Langdon, JD, LL.M., 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

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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

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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 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.



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.

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How to Register: FOUR SEASONS RESORT AT NAPLES BEACH CLUB OCTOBER 25- 31, 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 your 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
_____	10-26-26	Family Individual and Business Tax Planning (6 CPEs-Group Live-Taxes)
_____	10-27-26	Creative IRA, Life Insurance and Retirement Planning Techniques (6 CPEs-Group Live-Taxes)
_____	10-29-26	2026 Individual Tax Update (6 CPEs-Group Live-Taxes)
_____	10-30-26	Business Tax Developments-2026 (6 CPEs-Group Live-Taxes)

HOTEL INFORMATION

<p>Please fill in</p> <p>Arrival date: _____</p> <p>Departure date: _____</p> <p>Bedding Type: please check:</p> <p>One king bed: _____</p> <p>Two queen beds: _____</p> <p>** Total cost per room, multiply the package cost by 2.</p>	<p style="text-align: center;">(Nights of October 25- 30, 2026) (departure on October 31, 2026)</p> <p><u>Room category</u></p> <p>Deluxe Resort View _____</p> <p>Partial Oceanview _____</p> <p>Oceanview _____</p> <p>Oceanview one-bedroom suite _____</p> <p>Note: Hotel package costs are subject to change without notice. Cost of extra nights and additional persons: Please call for details.</p> <p>Hotel package payment: \$500 per person due with this reservation: Balance due: August 1, 2026</p>	<p style="text-align: center;">(7 days/6 nights) (Per Person) Double Occupancy</p> <p style="text-align: center;"><u>Package Cost**</u></p> <p style="text-align: center;">Please check</p> <p style="text-align: center;">_____ \$2,195</p> <p style="text-align: center;">_____ \$2,595</p> <p style="text-align: center;">_____ \$3,481</p> <p style="text-align: center;">_____ \$4,995</p>
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REGISTRATION FORM (CONTINUED)- NAPLES 2026

PAYMENT: <input type="checkbox"/> Pay by check (mail check to address below) <input type="checkbox"/> Charge my credit card	COST: Conference fee \$ _____ Hotel deposit # people _____ x \$500 = \$ _____ TOTAL AMOUNT \$ _____
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[Balance of hotel package due August 1, 2026]

<input type="checkbox"/> MC <input type="checkbox"/> VISA	_____ Card number	_____ Exp date	_____ Code
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I am a (an):

State(s) for which CPE is required: _____ I work in: _____ Public accounting _____ Industry _____ Other _____	<input type="checkbox"/> CPA <input type="checkbox"/> Atty <input type="checkbox"/> PA <input type="checkbox"/> Other <input type="checkbox"/> CFP <input type="checkbox"/> EA (PTIN _____)
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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 AUGUST 1, 2026

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

Signed: _____

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)

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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