NTI

2025 Resort Conference & Self-Study Programs

CPE for Accountants in Public Accounting and Industry

TIMELY TOPICS

Taxation

Prerequisite: Basic understanding of taxation
Advanced preparation: None
Field of Study: Taxes
Level: Overview
Recommended CPE hours: 6
Objectives and descriptions are noted below
Delivery method: Group live

> **"The perfect blend of high-quality education and impressive leisure for my family."**
>
> James Douglas, CPA, Michigan

Includes Detailed Coverage of 2025 Tax Act When Passed

2025 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 2025 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 - 2025

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

Post-Election Estate, Gift, and Retirement Planning Strategies and Update- 2025- Part 1 and 2

Objective: Post-Election Estate, Gift, and Retirement Planning Strategies and Update- 2025- Part 1 and 2

This course addresses estate, gift and retirement planning in light of a new White House administration and imminent tax reform. Topics include the impact of extending the federal estate and gift exemption beyond 2025 and planning, if any, that should be done prior to that date; overview of key provisions that should be included in all trusts; common gift tax errors; planning strategies involving state estate and gift taxes including state tax nexus requirements, common family estate and gift tax issues, and more. Specific topics vary depending on the status of new tax legislation but will include a discussion of pending legislation affecting estate and gift taxation, and more. Recommended CPEs: 6 hours per day.

Recommended CPEs: 6 hours- Part 1, and 6 hours- Part 2. (12 hours total) Field of study: Taxes

Latest Asset Protection Strategies for Individuals and Business Owners - 2025

Objective: To address the tax and non-tax aspects of asset protection planning for individuals and business owners.

The session will begin with an overview of the fundamentals of asset protection, the stages of asset protection planning, and the tools associated with each planning stage. More advanced tax-advantaged asset protection techniques will be introduced and discussed with emphasis on appropriate client use of the techniques. Some of the advanced techniques that will be covered include: use of LLCs, corporations, irrevocable trusts, Offshore trusts, and Offshore foundations. A more detailed discussion will include: use of LLCs and "charging orders;" and tenants-by-the entirety arrangements; use of Domestic and Foreign Asset Protection Trusts, the FBAR reporting rules and risk of non-compliance; and integrating the estate planning with asset protection. In particular, the tax consequences and benefits of asset protection tools will be highlighted, as well as the compliance requirements necessary to achieve those tax savings.

Recommended CPEs: 6 hours - Field of study: Taxes

Estate and Gift Planning Strategies and Update - 2025

Objective: To discuss various estate planning strategies prior to the cliff reduction in 2026.

This course addresses estate and gift planning in light of a new White House administration and possible tax reform. Topics include the impact of extending the federal estate and gift exemption beyond 2025; overview of key provisions that should be included in all trusts; common gift tax return errors; common family estate and gift tax issues, and more. Specific topics vary depending on the status of new tax legislation but will include a discussion of pending legislation affecting estate and gift taxation, grantor trusts and use of INGs, sales to grantor trusts, slats, spats, reciprocal and non-reciprocal trusts, planning for the non-US domiciliary and foreign trust, recent case law developments, and more.

Recommended CPEs: 6 hours. Field of study: Taxes

Accounting and Auditing

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

*Each course consists of 6 hours of Group Live CPE. In addition to the Group Live CPE offered, participants can choose from a selection of self-study courses that supplement the remainder of their total CPE hours purchased. Self-study courses will be distributed at the conferences, or downloaded on-line in a PDF format. Recommended CPE hours are based on the NASBA's Registry-QAS measurement of 50 minutes per CPE hour. Certain states grant CPE credit using different measurements. Please consult with your state licensing board.

PATRICIA M. ANNINO, JD, LLM
Partner in Rimon's Trust and Estates Group. A nationally recognized authority on estate planning and taxation with more than 30 years of experience serving the diverse needs of families, individuals, and owners of closely-held businesses. A frequent public speaker, Ms. Annino has presented nationally to high-level donors and trustees of hospitals, museums, and other nonprofits, as well as private banking clients, owners of closely-held businesses, and alumni organizations. She has spoken to various groups about her book, Women and Money: A Practical Guide to Estate Planning, Patricia also writes a monthly column for CPA Insider, a newsletter sent to more than 160,000 CPAs and other wealth managers and advisors.

THOMAS E. BAYER, CPA, CExP
Partner-in-charge of the Indianapolis office of Sikich specializing in business succession planning, estate planning, tax planning and compliance, and business advisory. He is both a CPA and Certified Exit Planner (CExP), with more than 28 years of experience providing tax and advisory services to commercial clients across various industries.

JAMES D. BRANDENBURG, CPA, MST
Partner with the national CPA firm of Sikich, with extensive experience in corporate and partnership tax law, mergers and acquisitions and tax legislation. Particular expertise working with owners of closely held businesses including tax planning and reporting for manufacturers, distributors and contractors; International tax consulting and compliance, LIFO inventory planning, among others. National speaker on federal tax matters.

STEVEN C. FUSTOLO, CPA, MBA
Partner with the CPA firm of James J. Fox & Company. AICPA author and national columnist for various publications including The Practical Accountant. Outstanding Discussion Leader award recipient. Award-winning author of more than eleven books and courses.

THOMAS M. BRINKER, JR., CPA, PFS, CHFC, CFE, AEP
Professor of Accounting at Arcadia University and Executive Director for the MBA program and Chair for The American College Center for Special Needs. National speaker on various tax topics and author of dozens of articles in numerous journals, including The Journal of Accountancy, The Journal of International Taxation, The Tax Adviser, The CPA Journal and The Journal of Practical Estate Planning. Recipient of numerous awards for teaching excellence, including the Professor of the Year Award and the PICPA Educator of the Year Award. Currently a tax consultant to a local CPA and law firms in the Philadelphia area concentrating in tax planning and compliance for individuals and their businesses as well as tax planning for special needs families. caring for those with special needs children.

LUCIEN P. GAUTHIER, JD, LLM, CPA
CPA and tax attorney in practice, Lucien Gauthier is President of Boston Tax Institute, and a national lecturer on federal taxation, specializing in individual and business tax matters. Mr. Gauthier has represented hundreds of clients at the IRS examination and appeals levels, and acted as an expert witness on federal income tax matters in state court litigation. Mr. Gauthier is a former Adjunct Assistant Professor, Bentley College Graduate Tax Program, and has been a guest speaker for various other professional and business groups including the Boston University Institute on Federal Taxation, Bentley College Institute on Federal Taxation, and Greater Boston Association of Financial Planners, among others.

LARRY JOHNSON, CPA, MST
National lecturer on taxation to accountants and attorneys. CPA with more than 30 years experience with Sikich, a Top-40 CPA firm including acting as National Director of the Tax Exempt Division. Specializes in tax planning related to complicated business transactions, including tax exempt organizations, and philanthropic planning with high-wealth families. Works in tax representation before the IRS, including victories in United States Tax Court. Founding member of the Community Foundation for the Land of Lincoln.

THOMAS P. LANGDON, JD, LLM, CFA, CFP
Professor of Business Law at the Gabelli School of Business, Roger Williams University, and an adjunct professor of taxation at Georgetown University. Principal in Langdon & Langdon Financial Services, LLC. Nationally recognized author and speaker, and author of several books, as well as dozens of articles.

JOY MATAK, JD, LLM
Partner at Avelino Law, LLP in the firm's Private Client Services practice group, specializing in implementing advantageous tax strategies for multigenerational wealth families, owners of closely held businesses, and high net worth individuals, with focus on transfer tax planning, asset protection, life insurance structuring, and post-mortem planning. Regular, monthly contributor to Trusts & Estates magazine and co-author of articles for the Tax Management Estates, Gifts and Trusts (BNA) Journal; Estate Planning Review The CCH Journal, among others. Co-author of a book entitled Estate Planning: Estate, Tax and Other Planning after the Tax Cuts and Jobs Act of 2017.

MICHAEL R. MIRANDA CPA, QKA, AEP
Principal in Miranda CPA & Consulting LLC in Sioux Falls, SD. His tax practice focuses on corporate, individual, estate and gift, and tax accounting. He also provides employee benefit planning and consultation services for qualified and non-qualified plan and welfare benefit plans. A recognized speaker on tax law, employee benefit planning, and estate planning through the country.

ROBERT "CHRIS" PROVINCE, CPA
CPA in private practice for over 30 years and national lecturer on taxation for the accounting and banking industries. Former partner at a national CPA firm and previous adjunct professor of accounting and tax at various universities around the country. Past member of the both the AICPA National Committee on S-Corporations and the Qualifications Committee for the California Board of Accountancy.

GIDEON ROTHSCHILD, JD, CPA
A CPA and retired partner with the New York City law firm of Moses & Singer, LLP, where he co-chaired the Trusts & Estates and Wealth Preservation Group. Mr. Rothschild focuses his practice in the areas of domestic and international estate planning techniques for high net worth clients and is a nationally recognized authority on wealth preservation and foreign trusts. He is a member of the Advisory Boards of BNA's Tax Management and Trusts and Estates, and a Past Chair of the New York Chapter of the Society of Trust and Estate Practitioners (STEP).

Co-author of the BNA Tax Management portfolio on Asset Protection Planning and author of numerous articles for publications including Trusts and Estates and Estate Planning. Mr. Rothschild is a recipient of the prestigious Distinguished Estate Planner award from the National Association of Estate Planners and Councils and is listed in Chambers USA, Best Lawyers in America, Top 100 New York Super lawyers and Worth's Top 100 Lawyers.

Former Adjunct Professor at the University of Miami Law School and New York Law School Graduate Programs and frequent lecturer to professional groups including the University of Miami's Philip Heckerling Institute and the American Institute of Certified Public Accountants.

COEUR D'ALENE, IDAHO

JUNE 8-14

Nestled in the majestic Rocky Mountains and right on the shore of **Lake Coeur d'Alene**, acclaimed by National Geographic as one of the most beautiful lakes in the world, lies a storied Idaho destination. Whatever adventure you seek, the exhilaration of ziplining, the thrill of summiting a mountain, or the joy of cycling with friends in a mount paradise – a stay in Coeur d'Alene will help you rediscover your innate sense of adventure.

Suggested Activities for You and Your Family:

- Cruise around beautiful Lake Coeur d'Alene
- Enjoy the Hotel's top-rated spa
- Hiking and biking around the Lake
- Golf on Coeur d'Alene's world famous golf course and the Floating Green
- Whitewater rafting
- Zip lining
- Parasailing
- Shop in town

HOTEL ACCOMMODATIONS:

The Coeur d'Alene Resort is proud to be a part of the Pacific Northwest's iconic history. In the early years since their founding in 1986, the resort has grown into a world-class destination. In addition to their critically acclaimed golf course, and home of the world's only Floating Green, The Resort has a delightful array of resort amenities to fill every unique interest. Enjoy award-winning salon and spa, 5-star dining, the Pacific Northwest's largest wine cellar, boat marina, infinity pool and private beach, shopping, nightlife, and unmatched outdoor recreation from lake cruises to hiking.

GROUP BASE HOTEL PACKAGE:

- 7 days/6 nights: Lakeview, double occupancy..
- Upgrades: Lakeview King, limited availability, please ask for details.
- Package excludes the cost of conference fee.
- Hotel package costs are subject to change without notice.
- **Please see Dossier for hotel cost, and conference fee.**

Jun 8	Sun	Arrival 6:30 - 7:00pm	 Welcome to The Coeur d'Alene Resort Orientation Meeting No Meeting Scheduled
Jun 9	Mon	7:30am-12:50pm 6:00pm - 7:00pm	**2025 Individual Tax Update** CPE Hours: 6 Group Live - Taxes* Reception hosted by NTI
Jun 10	Tue	7:30am-12:50pm	**Business Tax Developments - 2025** CPE Hours: 6 Group Live - Taxes*
Jun 11	Wed	Day of leisure	No meeting scheduled
Jun 12	Thu	7:30am-12:50pm	**Post-Election Estate, Gift, and Retirement Planning Strategies and Update- 2025- Part 1** CPE Hours: 6 Group Live - Taxes*
Jun 13	Fri	7:30am-12:50pm	**Post-Election Estate, Gift, and Retirement Planning Strategies and Update- 2025- Part 2** CPE Hours: 6 Group Live - Taxes*
Jun 14	Sat		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.



BANFF, CANADA

JULY 13-19

Banff National Park, located in Alberta, Canada, is famous for its vibrant lakes, majestic mountains and easy access to outdoor adventures of all kinds. The park spans 2,564 square miles of striking mountainous terrain in the vast wilderness of the Canadian Rockies. Canada's first national park and the world's third, it has a rich heritage as one of the world's most awe-inspiring mountain destinations. In the summer months, the area is perfect for biking, hiking and so much more; no matter your preference, there's something for everyone. The bustling town of Banff and the village of Lake Louise are uniquely located in the national park. In this one of a kind place, there's something for everyone to discover.

Suggested Activities for You and Your Family:

- Sulphur Mountain Gondola
- Shopping in Banff
- Cave and Basin National Historic Site
- Visit art galleries and museums
- Take a boat cruise on Lake Minnewanka
- Explore the breathtaking Lake Louise

HOTEL ACCOMMODATIONS:

Tucked in Banff's peaceful wilderness, The **Rimrock Resort Hotel** offers and exclusive mountain retreat, inviting you to break away from the ordinary. For over a century, this perch in the Canadian Rockies has been the site of curious exploration, restorative wellness and immersive recreation. Located just minutes from Banff Upper Hot Springs and the Banff Gondola, The Rimrock Resort Hotel offers an elevated escape close to some of the area's premier attractions and activities, including golfing, skiing, hiking, biking and more. From the grand lobby welcome to the embracing mountain views, each inviting stay at The Rimrock Resort Hotel is thoughtfully designed to captivate from check-ion to check-out

GROUP BASE HOTEL PACKAGE:

- 7 days/6 nights: Deluxe Double Occupancy
- Package excludes the cost of conference fee.
- Hotel package costs are subject to change without notice.
- **Please see Dossier for hotel cost, and conference fee.**

Jul 13	Sun	Arrival 6:30 - 7:00pm	Welcome to Banff Orientation Meeting
Jul 14	Mon	7:30am-12:50pm 6:00pm- 7:00pm	**Post-Election Estate, Gift, and Retirement Planning Strategies and Update- 2025- Part 1** CPE Hours: 6 Group Live - Taxes* Reception hosted by NTI
Jul 15	Tue	7:30am-12:50pm	**Post-Election Estate, Gift, and Retirement Planning Strategies and Update- 2025- Part 2** CPE Hours: 6 Group Live - Taxes*
Jul 16	Wed	Day of leisure	No meeting scheduled
Jul 17	Thu	7:30am-12:50pm	**2025 Individual Tax Update** CPE Hours: 6 Group Live - Taxes*
Jul 18	Fri	7:30am-12:50pm	**Business Tax Developments- 2025** CPE Hours: 6 Group Live - Taxes*
Jul 19	Sat		Recommended day of departure

***Note:** All conference meetings are held at the Conference Center located adjacent to the Lodge at Jackson Hole. Breakfast will be served in the hotel's main dining room starting at 7:00am for participants. Coffee and tea will be served during the conference meeting.
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 PDF downloadable format or mailed to you in a manual format in advance of the conference. Self-study materials will not be distributed at the conference. Summary of CPEs available at this program: Live Group study= 24 CPEs; Self-Study=16 CPEs for 40 total CPEs

THE CLOISTER, SEA ISLAND, GA

AUGUST 3-9

Located off the coast of Southern Georgia, Sea Island is like your own private tropical island. Here, peace, quiet, and privacy meet with an abundance of activities, all embraced with Southern hospitality, world-class golf, tennis, and miles of uninterrupted immaculate sandy beaches and lush tropical landscapes. The Cloister's "country club" ambiance offers you total exclusivity and gracious Southern hospitality, while providing you with all the amenities of neighboring St. Simons Island – just a convenient five-minute drive away where you'll find three golf courses, restaurants, and several specialty shops.

HOTEL ACCOMMODATIONS:

The Cloister is one of the East Coast's finest resorts. Set on five miles of private beach, the resort 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 Cloisters Spa.
Hotel Rating: Forbes 5-Star

GROUP BASE HOTEL PACKAGE:

- 7 days/6 nights: Cloister Garden Wing - double occupancy.
- Upgrades: Ocean View Beach Club and Cloister River View Rooms and One-Bedroom Suite, limited availability, please ask for details.
- Package excludes the cost of conference fee.
- Hotel package costs are subject to change without notice.
- **Please see Dossier for hotel cost, and conference fee.**

Suggested Activities for You and Your Family:

- On-and off-shore Boating and Fishing
- Three Championship Golf courses
- Relax at the Cloister's five mile private beach
- Camp Cloisters and Family Activities
- Horseback riding
- Tennis at the Cloisters Tennis Center
- The Cloister Spa
- Ballroom Dancing Lessons
- Nature Tours
- Skeet Shooting School

Aug 3	Sun	Arrival 6:30 - 7:00pm	 Welcome to The Cloister Orientation Meeting
Aug 4	Mon	7:30am-12:50pm 6:00pm-7:00pm	**2025 Individual Tax Update** CPE Hours: 6 Group Live - Taxes* Reception hosted by NTI
Aug 5	Tue	7:30am-12:50pm	**Business Tax Developments - 2025** CPE Hours: 6 Group Live - Taxes*
Aug 6	Wed	Day of leisure	No meeting scheduled
Aug 7	Thu	7:30am-12:50pm	**Latest Asset Protection Strategies for Individuals and Business Owners - 2025** CPE Hours: 6 Group Live - Taxes*
Aug 8	Fri	7:30am-12:50pm	**Estate and Gift Planning Strategies and Update - 2025** CPE Hours: 6 Group Live - Taxes*
Aug 9	Sat		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.



ITALIAN RIVIERA, SANREMO, ITALY

AUG 24 - AUG 31

Sanremo is a the most famous locality of the West Riviera, known also as Flowers Riviera. The town has an extremely mild climate, just 60 minutes from Nice International airport and 45 minutes from Monte-Carlo. The town is well-known for its highly developed cultivations of flowers, its numerous social, cultural and sports events (Italian Song Festival, bicycle race Milano-Sanremo, "Old-Timer" Car Rally) and for the illustrious personalities who lived here, such as Monet, Ciajkovskij, Alfred Nobel (founder of the world renowned prize) and several Nobel prize winners themselves, not to mention the most famous members of European aristocracy and elite , as well as the international jet setters.

Suggested Activities for You and Your Family:

- Walking Tour of Sanremo (included in hotel package)
- Visit Monte Carlo
- Enjoy the Hotel's Royal Wellness spa
- Day tour of the towns of the Italian Riviera such as Dolceacqua and the Nervia Valley, Cervo and Ventimiglia
- Visit a winery or olive oil farm

HOTEL ACCOMMODATIONS:

Royal Hotel Sanremo is an exclusive property rich in history and tradition, just the ideal choice for guests seeking intimacy, relaxation and luxury. The Hotel has been the home of the most famous European royalty, aristocracy and elite throughout history, with its touch of modern design; tradition and innovation blend perfectly for a contemporary setting with a timeless harm and impeccable service.

GROUP BASE HOTEL PACKAGE:

- 7-night hotel accommodations including hotel value added tax (VAT)
- 12 meals including:
  - 7 daily buffet breakfasts
  - 3 buffet lunches, and
  - 2 dinners at the hotel's restaurant
- Walking tour of Sanremo
- Use of the Hotel's outdoor heated sea water pool
- Entrance to the no prescription wet zone of the Royal Wellness (from age 18)

Date			Meetings
Aug 24	Sun	Arrival 6:30- 7:30pm	 Hospitality Desk - Welcome to Sanremo Orientation Meeting
Aug 25	Mon	Day of leisure 7:00pm- 8:00pm 8:00pm- 10:00pm	No Meeting Scheduled Reception Group Dinner
Aug 26	Tue	7:30am-12:50pm	**2025 Individual Tax Update** CPE Hours: 6 Group Live - Taxes*
Aug 27	Wed	7:30am-12:50pm	**Business Tax Developments - 2025** CPE Hours: 6 Group Live - Taxes*
Aug 28	Thu	Day of leisure	No meeting scheduled
Aug 29	Fri	7:30am-12:50pm	**Post-Election Estate, Gift, and Retirement Planning Strategies and Update- 2025- Part 1** CPE Hours: 6 Group Live - Taxes*
Aug 30	Sat	7:30am-12:50pm	**Post-Election Estate, Gift, and Retirement Planning Strategies and Update- 2025- Part 2** CPE Hours: 6 Group Live - Taxes*
Aug 31	Sun		Recommended day of departure

Please go to www.nticpe.com for details on tours and prices.

Notes: Breakfast will be served in the hotel's main dining room starting at 7:00am for participants. 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 PDF downloadable format or mailed to you in a manual format in advance of the conference. Self-study materials will not be distributed at the conference. Summary of CPEs available at this program: Live Group study= 24 CPEs; Self-Study=16 CPEs for 40 total CPEs.

NAPLES, FLORIDA

OCTOBER 26 - NOVEMBER 1

Naples is a city on the Gulf of Mexico in southwest Florida that's known for high-end shopping 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 find white "sugar" sand, including those at Clam Pass Park and Delnor-Wiggins Pass State Park. Explore Everglades National Park, Big Cypress National Preserve and Rookery Bay.

HOTEL ACCOMMODATIONS:

Join NTI for a conference scheduled at the brand-new five-star Four Seasons Resort at the Naples Beach Club, in Naples, Florida, opening in the summer 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.

GROUP BASE HOTEL PACKAGE:

- 7 days/6 nights: Resort View double occupancy.
- Upgrades to Partial Oceanview, Oceanview, and One-Bedroom Oceanview Suites - Limited availability
- Package excludes the cost of conference fee
- Hotel package costs are subject to change without notice
- Please see Dossier for hotel cost, and conference fee prices

Suggested Activities for You and Your Family:

- 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.
- The exclusive shops and boutiques at Fifth Avenue South providing a plethora of luxury goods.
- The Naples Botanical Garden, Corkscrew Swamp Sanctuary, Lowdermilk Beach, and the Fifth Avenue South Naples Zoo.
- Golf at the area's numerous world-class golf courses.

Oct 26	Sun	Arrival 6:30 - 7:00pm	 Welcome to Naples Orientation Meeting
Oct 27	Mon	7:30am-12:50pm 6:00pm - 7:00pm	**2025 Individual Tax Update** CPE Hours: 6 Group Live - Taxes* Reception hosted by NTI
Oct 28	Tue	7:30am-12:50pm	**Business Tax Developments - 2025** CPE Hours: 6 Group Live - Taxes*
Oct 29	Wed	Day of leisure	No meeting scheduled
Oct 30	Thu	7:30am-12:50pm	**Post-Election Estate, Gift, and Retirement Planning Strategies and Update- 2025- Part 1** CPE Hours: 6 Group Live - Taxes*
Oct 31	Fri	7:30am-12:50pm	**Post-Election Estate, Gift, and Retirement Planning Strategies and Update- 2025- Part 2** CPE Hours: 6 Group Live - Taxes*
Nov 1	Sat		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.

Located in the Southern Caribbean, **Aruba** has been blessed with miles of pristine ivory beach and clear azure water. Aruba's trademark "Divi" trees dot the island landscape, while year-round sunshine and cooling trade winds make it a paradise haven. From exquisite dining experiences, world-class shopping, myriad sports and activities, exciting nightlife, dazzling shows, and casino gambling to historic landmarks and museums — all are enjoyed on the magnificent island of Aruba. Bon Bini!

HOTEL ACCOMMODATIONS:

Welcome to **The Ritz-Carlton Aruba**. With its Ritz-Carlton pedigree, an exclusive location on the island's famed Palm Beach and remarkable offerings of dining, wellness and recreation, the Ritz-Carlton Aruba ushers in a new and highly valued vacation experience to the Caribbean. To an island renowned for its pristine beaches and beautiful landscape, experience a new standard of luxury and elegance in accommodations, facilities, activities and services that ranks among the finest resorts worldwide. **Hotel rating: AAA 4-Diamond.**

Suggested Activities for You and Your Family:

- Natural Bridge
- Duty-free shopping in Oranjestad, Aruba's capital
- Scuba Diving
- Atlantis Submarine Tours
- Off-road Aruba Safaris
- California Lighthouse
- Snorkeling
- Aruba Historical Museum
- Golf
- Horseback riding on the beach
- Glass Bottom Boat Cruise
- Day trip to De Palm Island
- Deep Sea Fishing
- Island Tours
- Arikok National Park
- Casinos
- Sunset Dinner Cruises
- The Butterfly Farm
- Aruba's natural Caves

GROUP BASE HOTEL PACKAGE:

- 8 days/7 nights: Ocean View - Run of House double occupancy.
- Upgrades to Ocean Front and Club Ocean Front Executive Suite, limited availability, please ask for details.
- Package excludes the cost of conference fee
- Hotel package costs are subject to change without notice.
- **Please see Dossier for hotel cost, and conference fee prices**

Nov 9	Sun	Arrival 6:30 - 7:00pm	 Welcome to Aruba Orientation Meeting
Nov 10	Mon	7:30am-12:50pm 6:00pm-7:00pm	**2025 Individual Tax Update** CPE Hours: 6 Group Live - Taxes* Reception hosted by NTI
Nov 11	Tue	7:30am-12:50pm	**Business Tax Developments - 2025** CPE Hours: 6 Group Live - Taxes*
Nov 12	Wed	Day of leisure	No meeting scheduled
Nov 13	Thu	Day of leisure	No meeting scheduled
Nov 14	Fri	7:30am-12:50pm	**Latest Asset Protection Strategies for Individuals and Business Owners- 2025** CPE Hours: 6 Group Live - Taxes*
Nov15	Sat	7:30am-12:50pm	**Estate and Gift Planning Strategies and Update- 2025** CPE Hours: 6 Group Live - Taxes*
Nov 16	Sun		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.



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 forests and explore the historic whaling town of Lahaina. Maui's natural wonders never cease.

HOTEL ACCOMMODATIONS:

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 rises like a classical Hawaiian palace 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 reveals a study in relaxed elegance.
Hotel Rating: AAA 5-Diamond

GROUP BASE HOTEL PACKAGE:

- 8 days/7 nights: Garden View double occupancy.
- Upgrades to Ocean View - limited availability Please ask for details.
- Package excludes the cost of conference fee
- Please see Dossier for hotel cost, and conference fee prices
- **Package excludes the cost of conference fee.**

Suggested Activities for You and Your Family:

- "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.

Nov 30	Sun	Arrival 6:30pm - 7:00pm	 Welcome to Maui Orientation Meeting
Dec 1	Mon	7:30am-12:50pm 6:00pm-7:00pm	**2025 Individual Tax Update** CPE Hours: 6 Group Live - Taxes* Reception hosted by NTI
Dec 2	Tue	7:30am-12:50pm	**Business Tax Developments -2025** CPE Hours: 6 Group Live - Taxes*
Dec 3	Wed	Day of leisure	Day of leisure - No meeting scheduled
Dec 4	Thu	Day of leisure	Day of leisure - No meeting scheduled
Dec 5	Fri	7:30am-12:50pm	**Post-Election Estate, Gift, and Retirement Planning Strategies and Update- 2025- Part 1** CPE Hours: 6 Group Live - Taxes*
Dec 6	Sat	7:30am-12:50pm	**Post-Election Estate, Gift, and Retirement Planning Strategies and Update- 2025- Part 2** CPE Hours: 6 Group Live - Taxes*
Dec 7	Sun		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.



PRICING

CONFERENCE & HOTEL

Cost includes all materials,continental breakfast at each meeting (for participants only), and a cocktail reception for you and your spouse/guests. Note: At some conferences, breakfast is part of hotel package and not served in the meeting room.

Group discounts:

10% for 3 or more registrants.
20% for 5 or more registrants.

CPE Pricing	24CPEs	32CPEs	40CPEs
By June 30, 2025	**$2,197***	**$2,298***	**$2,399***
After June 30, 2025	$2,297*	$2,398*	$2,499*

***Italy surcharge: Add $200 to the above conference fees.**

Cancellation Policy:

Please see individual conference Dossiers for flexible cancellation policies for each conference.

How to Register:

1. **888-515-3674 Ext 1 or fax 888-552-9749 and register by credit card (MasterCard/VISA)**
2. **Visit www.nti-cpe.com** and download location registration forms.

Choose from two Self-Study options.

Option 1: Purchase Individual Courses OR
Option 2: Purchase Unlimited CPE

Option 1: Purchase Individual Courses

There are two versions of each course:

- Paper/Manual Format - Sent By Mail
- Electronic Format - Sent to you via email in PDF format

Please see course listing on page 18 and purchase individual courses through our on-line cart

Option 2: Purchase Unlimited CPE

Unlimited CPE allows you to download as many courses as you want for one low price within a 12-month period from the date of purchase:

- 21 Courses available for download in PDF format upon purchase.
- 285 hours in taxation, 126 hours in accounting and auditing.
- Upon purchase, you will receive a private LOGIN password giving you access to all the courses available for download.

Special multiple-user and firm discounts.

The unlimited CPE option is available for all size firms, ranging from a single user to larger firm use.

UNLIMITED CPE PRICING

Firm Size	Item #	Price
1	80	$399
2	80A	$599
3	80B	$749
4-10	80C	$999
11-20	80D	$1,099
21-30	80E	$1,599
31-50	80F	$1,999

Note: Prices above provide the purchaser(s) with unlimited CPE downloads during the 12-month period after date of purchase.

For course descriptions, objectives and field of study details on these courses, please visit our web site: **www.nticpe.com** and select the self-study section.

Course Offering

Taxation

Field of Study: Taxes
Prerequisite: General understanding of federal taxation
Advanced Preparation: None
Format: Manual with exam
Level: Overview
CPE: 8 – 40 CPEs as noted, based on 50-minutes per CPE hour measurement

BUSINESS TAXATION
Item 600: 24 CPEs $249
Paper/Manual Format: Item 600: 24 CPEs $249
Emailed PDF: Item 600-E: 24 CPEs $179

COMPLETE GUIDE TO ESTATE AND GIFT TAXATION
Paper/Manual Format: Item 101: 35 CPEs $349
Emailed PDF: Item 101-E: 35 CPEs $269

TAX, BANKRUPTCY AND FINANCIAL PROBLEMS
Paper/Manual Format: Item 12: 19 CPEs $219
Emailed PDF: Item 12-E: 19 CPEs $149

DEFENSIVE DIVORCE
Paper/Manual Format: Item 620: 16 CPEs $199
Emailed PDF: Item 620-E: 16 CPEs $129

ASSET PROTECTION STRATEGIES FOR ACCOUNTANTS
Paper/Manual Format: Item 19: 18 CPEs $199
Emailed PDF: Item 19-E: 18 CPEs $129

CORPORATE TAX PLANNING
Paper/Manual Format: Item 511: 21 CPEs $249
Emailed PDF: Item 511-E: 21 CPEs $179

FAMILY TAX PLANNING
Paper/Manual Format: Item 70: 24 CPEs $249
Emailed PDF: Item 70-E: 24 CPEs $179

CHOICE OF ENTITY
Paper/Manual Format: Item 610: 22 CPEs $249
Emailed PDF: Item 610-E: 22 CPEs $179

SPECIAL PROBLEMS IN REAL ESTATE TAXATION
Paper/Manual Format: Item 22: 11 CPEs $169
Emailed PDF: Item 22-E: 11 CPEs $109

FAST-TRACK RETIREMENT PLANNING
Paper/Manual Format: Item 23: 17 CPEs $199
Emailed PDF: Item 23-E: 17 CPEs $129

ASSETS, INCOME AND CASH
Paper/Manual Format: Item 630: 14 CPEs $199
Emailed PDF: Item 630-E: 14 CPEs $129

1040 WORKSHOP
Paper/Manual Format: Item 11: 29 CPEs $299
Emailed PDF: Item 11-E: 29 CPEs $229

GUIDE TO FEDERAL CORPORATE AND INDIVIDUAL TAXATION
Paper/Manual Format: Item 102: 35 CPEs $349
Emailed PDF: Item 102-E: 35 CPEs $269

Special Offers:

Buy two courses, receive the third course FREE*

OR

Buy three courses, receive two FREE*

*Free course is based on the purchased course with the least number of CPE credits

Accounting and Auditing

Field of Study: Accounting and Auditing
Prerequisite: Basic understanding of accounting and auditing
Advanced Preparation: None
Format: Manual with exam
Level: Overview CPE: 8 – 40 CPEs as noted, based on 50-minutes per CPE hour measurement

SSARS No. 21 - 26
New Compilation and Review Standards
Paper/Manual Format: Item 32: 10 CPEs $139
Emailed PDF: Item 32-E: 10 CPEs $99

2025 FASB REVIEW BEST SELLER!
Paper/Manual Format: Item 30: 16 CPEs $199
Emailed PDF: Item 30-E: 16 CPEs $129

CURRENT DEVELOPMENTS — ACCOUNTING AND FINANCIAL REPORTING 2025
Paper/Manual Format: Item 6: 16 CPEs $199
Emailed PDF: Item 6-E: 16 CPEs $129

PRACTICE ISSUES - COMPILATION AND REVIEW UPDATE BEST SELLER!
Paper/Manual Format: Item 31: 20 CPEs $219
Emailed PDF: Item 31-E: 20 CPEs $149

GAAP - TAX BASIS Q&A
Paper/Manual Format: Item 33: 16 CPEs $199
Emailed PDF: Item 33-E: 16 CPEs $129

2025 FASB, SSARS AND SAS UPDATE AND REVIEW BEST SELLER!
Paper/Manual Format: Item 29: 24 CPEs (Accounting: 12, Auditing: 12) $249
Emailed PDF: Item 29-E: 24 CPEs (Accounting: 12, Auditing: 12) $179

AUDITING DEVELOPMENTS 2025
Paper/Manual Format: Item 20: 16 CPEs $199
Emailed PDF: Item 20-E: 16 CPEs $129

NEW AUDIT STANDARDS: SAS NOS. 134-141
Paper/Manual Format: Item 500: 10 CPEs $139
Emailed PDF: Item 500-E: 10 CPEs $89

For complete course descriptions and to purchase online, visit www.nticpe.com

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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

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NTI
Fustolo CPE LLC
8 The Green, Suite A
Dover, Delaware 19901

Phone: 888-515-3674 Ext 1
Fax: 888-552-9749
Email: conferences@nticpe.com