



NTI 2026 CONFERENCE
SANTA FE, NEW MEXICO
BISHOP'S LODGE- AUBERGE COLLECTION

JUNE 22-28, 2026



**NTI 2026 CONFERENCE PROGRAM
BISHOP'S LODGE AUBERGE COLLECTION
SANTA FE, NEW MEXICO
JUNE 22-28, 2026**

Location: **BISHOP'S LODGE -AUBERGE COLLECTION**
1297 Bishop's Lodge Road, Santa Fe, NM 87506
Phone: (505) 390-2323; Website: <https://auberge.com/bishops-lodge/santafe>

Airports: Albuquerque International Sunport (ABQ) – one hour,15-minute drive to Santa Fe

Transfers: Car rental is recommended.

Directions: Visit Map Quest for directions

Weather: Daytime: Warm and sunny, often reaching the high 80s.
Night: Cool and comfortable, dropping significantly after sunset

Area Info: Visit: www.santafe.org

BISHOP'S LODGE -AUBERGE COLLECTION– 7 Days/6 Nights

Bishop's Lodge is a one-of-a-kind luxury mountain resort bordering 1.7 million acres of national forest and 10 minutes from downtown Santa Fe. Bishop's Lodge offers exclusive access to Santa Fe's renowned cultural, art and culinary scenes and celebrates the spirit of adventure that epitomized the Rocky Mountains. The Lodge blends Southwestern heritage with modern elegance, offering hiking, horseback riding from its own stables, a spa, pool, acclaimed dining (like SkyFire), and a focus on wellness, set against the Sangre de Cristo foothills.

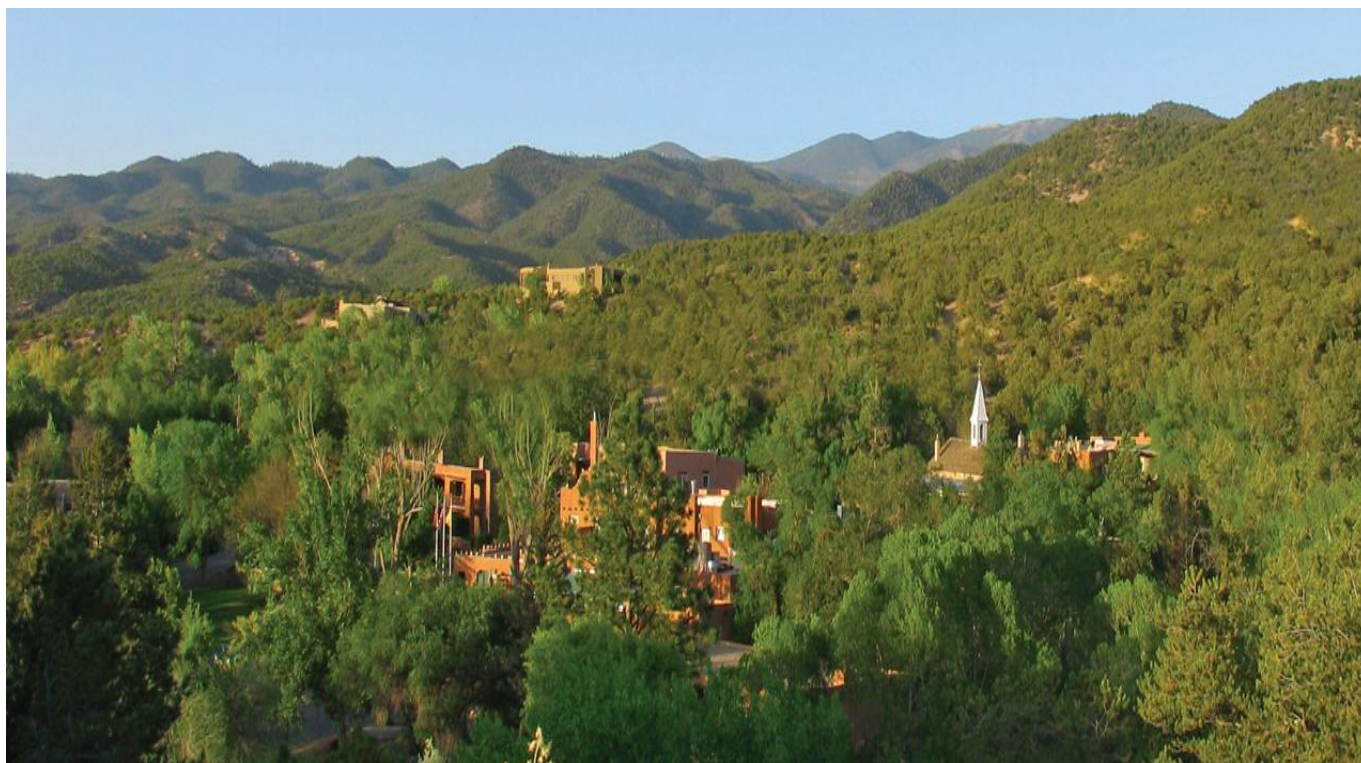
Distance to downtown Santa Fe: The Resort is located **three miles (10 minutes) from downtown Santa Fe** and offers a complimentary shuttle to and from downtown Santa Fe.

Check-in: 4:00pm

Check-out: 11:00pm (Surcharges may apply for late checkouts)

Hotel Rating: 5-Star

Parking: Valet Parking and Self-Parking



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



Accommodations:

The luxury room accommodations at Bishop's Lodge were crafted with reverence for the rich textures and subtle colors of New Mexico's Sangre de Cristo Mountains, and the talented local artisans in Santa Fe. Enjoy cozy sanctuaries that are accented by private terraces, traditional kiva fireplaces and woven Navajo rugs. Each accommodation celebrates local artisans by showcasing traditional Santa Fe artwork, artifacts and textiles, and are located within minutes by foot from the main amenities of the resort.

In-Room Amenities:

Bishop's Lodge, Auberge Resorts Collection, offers luxurious in-room amenities like [gas fireplaces](#), private patios/balconies, mini-bars, espresso machines, rain showers, and luxury bedding ([Egyptian cotton](#), down comforters), plus walk-in closets with robes, slippers, and humidifiers; expect modern tech like Smart TVs, free Wi-Fi, and laptop-friendly workspaces, all part of their individually furnished, themed rooms.

Room categories offered:

- Resort View
- Grove View- larger rooms
- Valley View Junior Suite

**CALL 888-515-3674 (Extension 1) or FAX 888-552-9749 or
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Resort View: 395+ sq. ft. - Room features one king or two queen beds with a private resort-view terrace with seating. Sitting area with in-room kiva fireplace, mosaic tiled bathroom with rain shower, air conditioning, wifi, TV and safe. Maximum: 2 persons for king bed and 4 for two queen bedding.



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Grove View- Larger Rooms: Large 550 sq. ft. room featuring one king bed or two queen beds and situated in a lush old-growth tree grove. Enjoy a sitting area with an in-room kiva fireplace, copper soaking tub, mosaic tile bathroom with rain shower, private terrace, air conditioning, wifi, TV and safe. Two-minute walk to Lodge. Maximum: 3 persons for king bed and 4 for two queen bedding. **LIMITED AVAILABILITY.**



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Valley View Junior Suite: 700 sq. ft – Suite features one king bed with a private valley-view terrace with seating. Sitting area with in-room kiva fireplace. Large mosaic bathroom with rain shower, air conditioning, wifi, TV and safe. Maximum: 2 persons. **LIMITED AVAILABILITY.**



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Hotel Package includes: 6-night hotel accommodations, including hotel room taxes, resort fee, daily housekeeping fee, and roundtrip portage fee.

Third/fourth Person Charge: Any additional occupants (beyond two) 18 years of age or older are subject to an addition charge of \$100 per person, per night, plus hotel taxes.

Resort Fee: Included in the hotel package is a resort fee that includes transportation to downtown Santa Fe, transportation throughout resort via golf cart, self parking, pool access, fitness center access, weekly activities, a welcome drink and amenity, twice daily housekeeping, bottled water and coffee refreshed daily, and high speed internet access in guestrooms and public spaces.

SPECIAL UPGRADE PRICE
Junior King Suites

LIMITED AVAILABILITY

HOTEL PACKAGE COST- 7 DAYS/6 NIGHTS
NIGHTS OF JUNE 22-27, 2026 DEPARTURE ON JUNE 28, 2026

<u>Room category</u>	(Per Person) Double Occupancy <u>Package Cost**</u>
Resort View	\$2,492
Grove View (larger rooms) - king or two queen	\$2,542
Valley View Junior King Suite – LIMITED AVAILABILITY	\$3,292

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

HOTEL PACKAGE PAYMENT:

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

Hotel prices are subject to change prior to making reservation.

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

Bishop's Lodge, Auberge Collection in Santa Fe offers luxurious amenities like a full-service spa (Stream Dance Spa), outdoor pool, hot tub, 24-hr fitness center, gourmet dining ([Skyfire](#) restaurant), shuttle service, concierge, and pet-friendly rooms, plus unique features like private patios with fire pits in some suites, though some outdoor activities like biking might have seasonal limitations. Expect daily housekeeping, in-room coffee/water, and options for horseback riding, yoga, and kids' programs.



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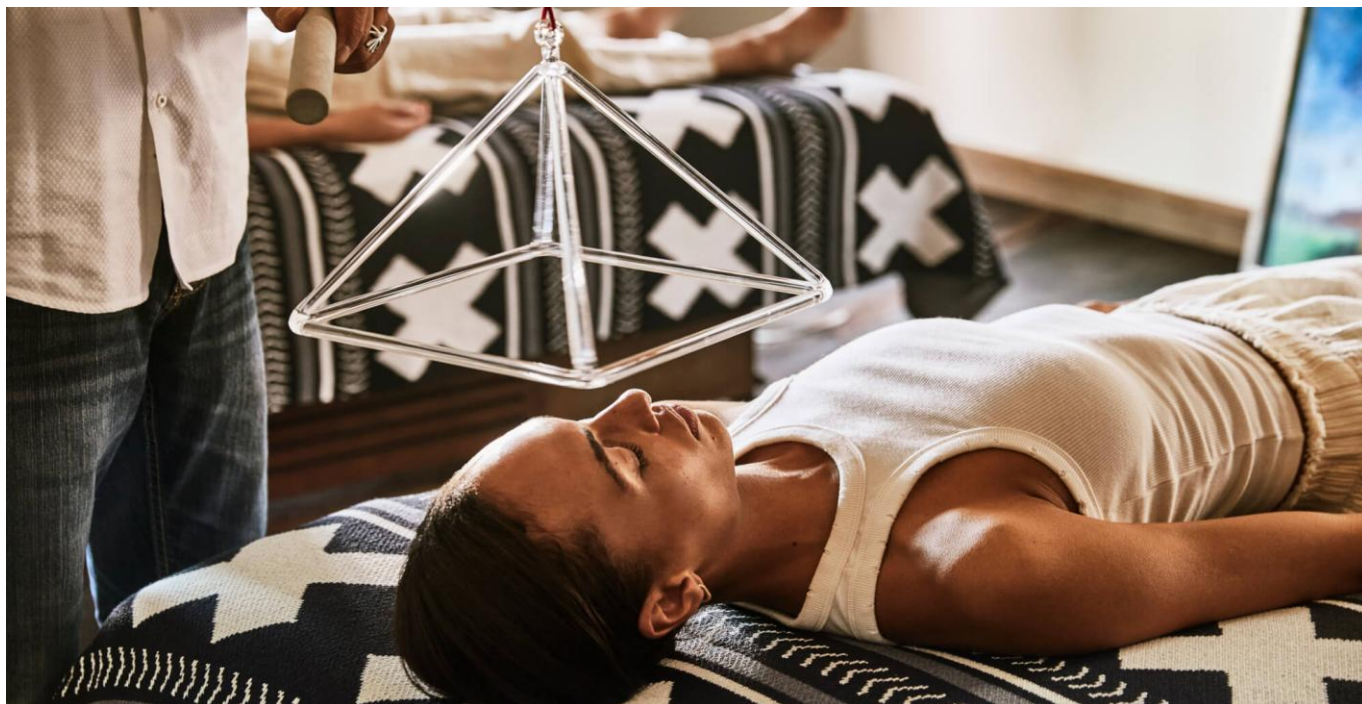
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The Joy of Wellbeing at Stream Dance Spa

Quiet your mind, soften your heart, and strengthen your body at our luxury spa in Santa Fe. At Bishop's Lodge, wellness experiences are rooted in ancient rituals and inspired by the healing power of Mother Nature. Align your body, mind, and spirit with regionally inspired treatments and products featuring natural, locally-grown, bloom-to-bottle ingredients. Our spa is dedicated to those seeking tranquility, connection, self-realization, and well-being. Guided by the principles of Awe, Connect, Excel and Nurture, The Joy of Wellbeing by Auberge is uniquely brought to life at Bishop's Lodge.



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Restaurants and Lounges:

Textured and multi-layered, the cuisine at Bishop's Lodge will be sure to send you home with memories to cherish for years to come. The dining experience invites you to slow down and engage all of your senses.

SkyFire: Nestled at the base of the Sangre de Cristo mountains, SkyFire draws inspiration from the diverse, rich ingredients and textures found in Mexico, and infuses them with unexpected modern techniques. The element of fire is present throughout the bar, main dining room and terrace where pinon or cedar wood logs are burned to evoke a scent which roots you to their grounding atmosphere.

The Bar: This cozy fire-lit space and adjacent patio features innovative craft cocktails and elevated Southwestern bar fare.

Two Dogs Café: This bright, cozy café offers lush mountain views, a calming atmosphere and features inspiring local artwork. Savor warm pastries, hearty sandwiches, craft coffees, fresh salads and cold pressed juices.

Poolside Dining: Cool off with a classic margarita or a crisp local brew, paired with fresh ceviches, bison burgers and Southwest inspired tacos from The Prickly Pear – their vibrant new poolside food truck.

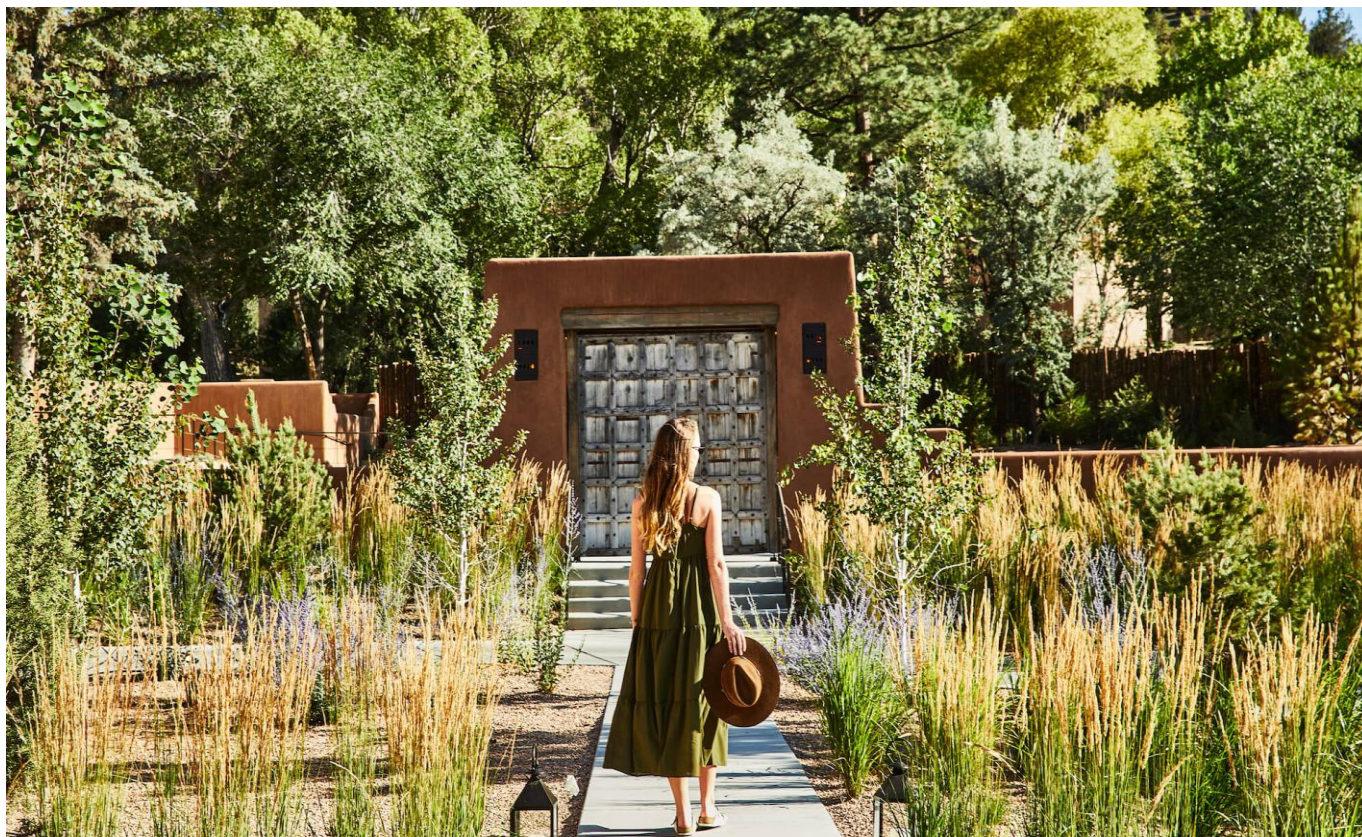


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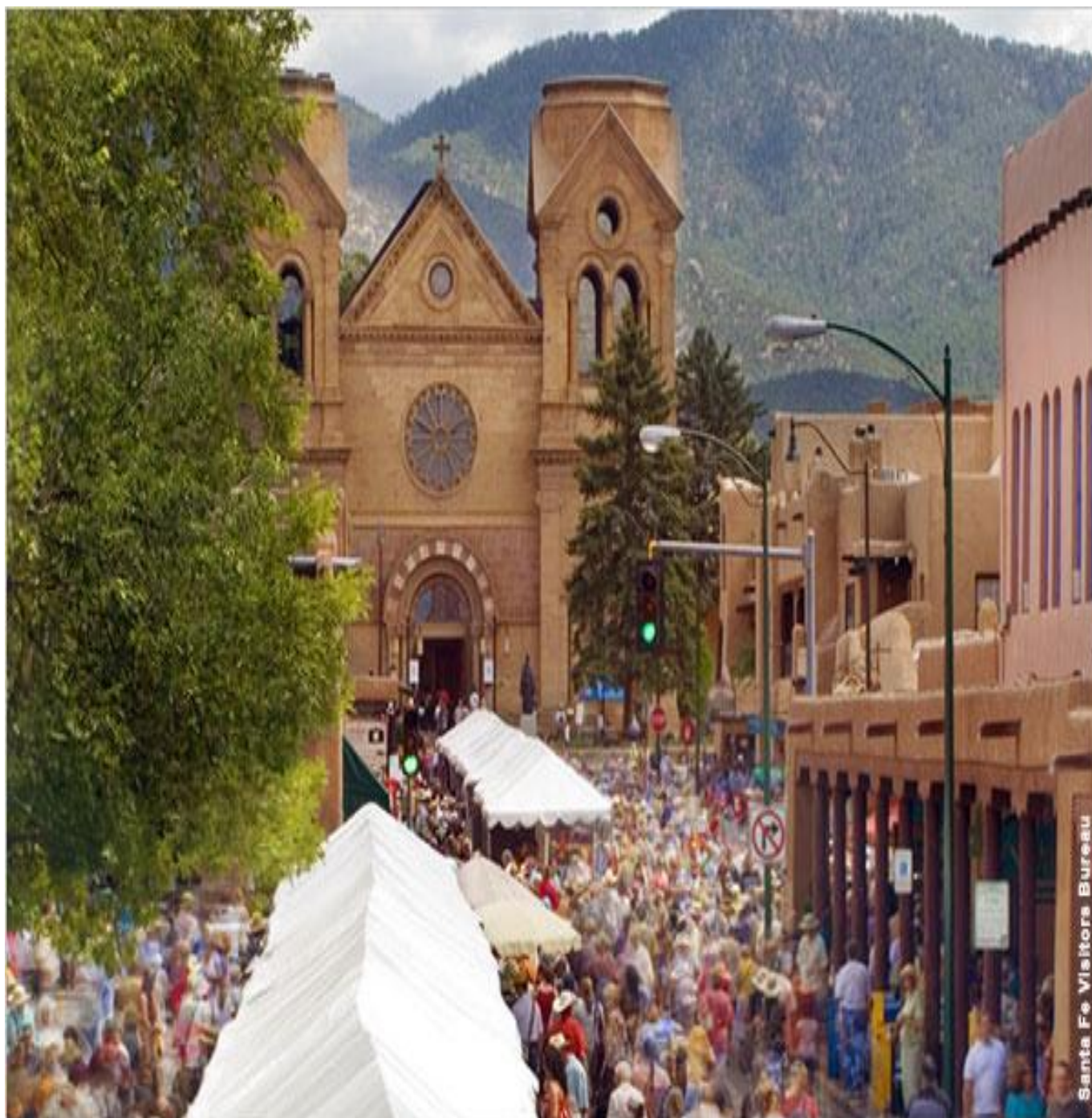
The Resort's Activities:



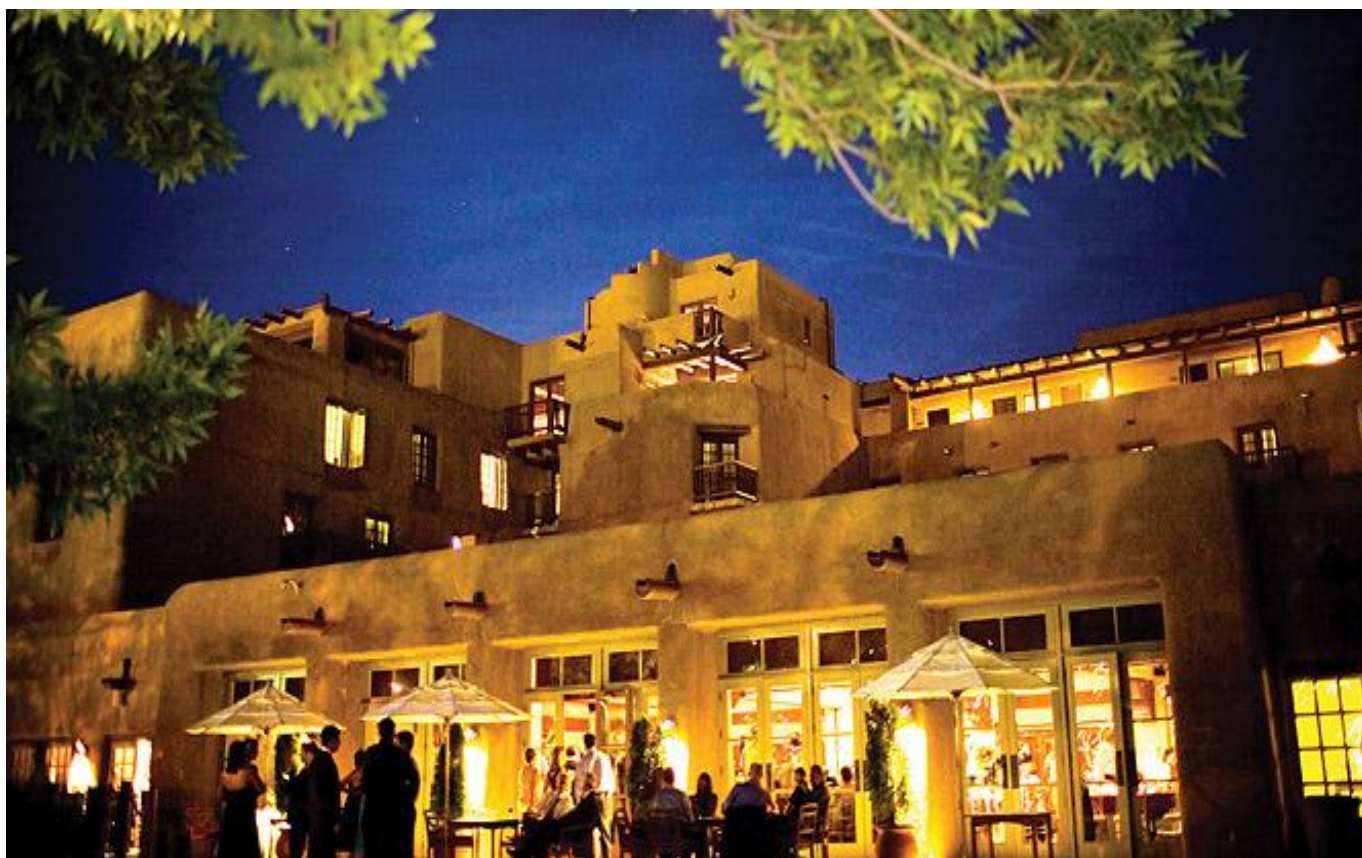
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Santa Fe, NM:

Claiming to be the most exotic city in North America, Santa Fe is cultured and diverse. Spanish and Native American influences make for a fascinating food, art and entertainment with a rich heritage evident all over town. With the third largest art market in the U.S., Santa Fe boasts hundreds of art galleries, a variety of museums, opera and trademark architecture. View Pueblo and Greek-revival styles in protected historic districts. Browse a gallery or attend on of several annual art markets, and take in the performing arts whether theater, dance or music. Outdoor recreation is a must in a destination that promises 300 sunny days each year. Hike, bike or swim in the summer or choose horseback riding, rafting, fishing or even riding a hot air balloon over the beautiful view in the valley below.



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Santa Fe:

Claiming to be the most exotic city in North America, Santa Fe is cultured and diverse. Spanish and Native American influences make for fascinating cuisine, art and entertainment scene with a rich heritage evident all over town. With the third largest art market in the U.S., Santa Fe boasts hundreds of art galleries, a variety of museums, opera and trademark architecture. View Pueblo and Greek-revival styles in protected historic districts, browse a gallery or attend one of several annual art markets, and take in the performing arts whether theater, dance or music. Hike, bike or swim or choose horseback riding rafting, fishing or even riding a hot air balloon over the beautiful view in the valley below the Rocky Mountains.

Suggested activities:

- Hike Camino Encantado and Los Caminitos Canyon
- Visit the Ghost Ranch
- Experience the Valles Caldera National Preserve
- Take a stroll through Santa Fe
- Take a Native American Cultural Tour
- Visit nearby timeless Taos
- Take the La Tierra Trails
- Shop in Santa Fe's eclectic galleries and stores
- Golf at one of Santa Fe's picturesque course
- Take a hot air balloon ride





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**NTI 2026 CONFERENCE SCHEDULE
BISHOP'S LODGE
SANTA FE, NEW MEXICO
JUNE 22-28, 2026**

DATE	MEETINGS	SOCIAL EVENTS/TOURS
06/22 Monday	Arrival - no meeting scheduled	6:30- 7:00pm: Hospitality Desk Welcome to Santa Fe Orientation Meeting
06/23 Tuesday	7:30am-12:50pm meeting 2026 Individual Tax Update Speaker: Larry Johnson, CPA, MST CPE Hours: 6 Group Live – Taxes	6:00-7:00pm: Reception Hosted by NTI
06/24 Wednesday	7:30am-12:50pm meeting: Business Tax Developments- 2026 Speaker: Larry Johnson, CPA, MST CPE hours: 6 Group Live – Taxes	
06/25 Thursday	Day of leisure – no meeting scheduled	
06/26 Friday	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	
06/27 Saturday	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	
06/28 Sunday	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 PDF downloadable 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 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

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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, 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.

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 March 1, 2026**. With respect to a cancellation occurring **after March 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).

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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.

How to Register: BISHOP'S LODGE, SANTA FE – JUNE 22-28, 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 sunset cocktail reception for you and spouse/guest.
_____ 40CPEs	\$2,499	\$2,599	
_____ 32CPEs	\$2,398	\$2,498	
_____ 24CPEs	\$2,297	\$2,397	

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

Please

check

Date

Topic

_____	06-23-26	2026 Individual Tax Update
_____	06-24-26	Business Tax Developments – 2026
_____	06-26-26	Family Individual and Business Tax Planning (6 CPEs-Group Live-Taxes)
_____	06-27-26	Creative IRA, Life Insurance and Retirement Planning Techniques (6 CPEs-Group Live-Taxes)

HOTEL INFORMATION

Please fill in:

Arrival date: _____

Departure date: _____

Requested bedding type: Please check:

One king bed _____

Two queen beds _____

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

(Nights of June 22-27, 2026)
(departure on June 28, 2026)

Please
check

(7 days/6nights)
(Per Person)
Double Occupancy

Room category

Resort View- King or Two Queen

Grove View -King or Two Queen

Valley View Junior King Suite

Package Cost**

\$2,492

\$2,542

\$3,292

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: March 1, 2026.

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EMAIL: conferences@nticpe.com

REGISTRATION FORM (CONTINUED)- SANTA FE 2026

PAYMENT:

Pay by check
(mail check to address below)

Charge my credit card

MC
 VISA

Card number

Exp date

Code

COST:

Conference fee \$ _____

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

TOTAL AMOUNT \$ _____

[Balance of hotel package due March 1, 2026]

State(s) for which CPE is required: _____

I am a: CPA Atty
 PA Other
 CFP

I work in: Public accounting Industry Other _____

EA PTIN _____

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 PDF format
 Distribute self-study courses to you on-site at the conference

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On March 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.

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