2015 Real Estate Conference
November 17, 2015
COCPA or Webcast

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I would like to attend this year's conference:

In person (150792615)   Webcast (150762422)

Registration Fees:

Member: $345 x ________ = $_______

Nonmember: $493 x ____ = $_______

Method of Payment:
Check *(Payable to Colorado Society of CPAs)*
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TO REGISTER MAIL THIS FORM TO:
Colorado Society of CPAs
7887 E. Belleview Ave, Suite 200
Englewood, CO 80111
or online at www.cocpa.org
303-773-2877   800-523-9082

Upcoming Seminars

9/25 **Webinar: Real Estate Tax – What Owners and Investors Need to Know**

10/28 **The 25 Most Important Tax Aspects of Real Estate Transactions and Investments**

11/5 **Webinar: Passive Activities: Helping Clients Survive the IRS's Challenges**

12/14 **Webinar: Capital Gains Tax Strategies for Advanced Transactions**

Special Thanks to our Committee:

Bryan Keith Adam, Anton Collins Mitchell LLP
Zedell Irene Loomis, Loomis Real Estate
Ronald Jay McArthur, EKS&H LLLP
Angelia Dawn McGill, Bauerle & Co PC
Larry Stone, Stone CPA LLC

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COCPA

Colorado Society of Certified Public Accountants
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Suite 200
Englewood, CO 80111

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COCPA® Colorado Society of Certified Public Accountants

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AGENDA

TIME	COURSE	DETAILS
8:30 – 9:20 am	**The Economic Outlook for the U.S. and Colorado: Headwinds or Tailwinds?** ***Rich Wobbekind*** Leeds School of Business University of Colorado at Boulder	• What will be the effect of changing federal reserve policies? • Long term growth prospects: will labor shortages and demographic change impact our future? • How will the Colorado economy and real estate industry fare in this environment?
9:20 – 10:10 am	**Hot Market? Don't Forget 1031 Exchanges!** ***Linda Garrett Levy*** 1031 Solutions LLC	• What property qualifies for a 1031 exchange? Explore the definition of "investment" property • Reporting failed exchanges-tax benefits of using installment reporting for failed exchanges that span two tax years • Update-the latest 1031 exchange rulings
10:10 – 10:25 am	***Networking Break***	
10:25 – 11:15 am	**Accounting and Auditing Update** ***Sean McDonald*** ***Tim Stueven*** Anton Collins Mitchell LLP	• Accounting and auditing update • Revenue recognition
11:15 am – 12:05 pm	**Key Concepts for IRA-Owned Real Estate** ***Bill Humphrey*** New Direction IRA Inc.	• Financial dynamics of a self-directed IRA real estate purchase • Review of UBIT for IRAs generated by UDFI and UBIT • Core information about self-directed IRAs for your clients
12:05 – 1:00 pm	***Lunch***	
1:00 – 1:50 pm	**Creative Deal Structures** ***Jay Rollins*** JCR Capital	• Discuss structural finance for commercial real estate investment • Explore financer "Tool Box" which will include tips & tricks of structuring equity, preferred equity, and mezzanine debt • Understand how these structures allow the financer to be very profitable but protect the principal at the same time
1:50 – 2:25 pm	***Networking Break***	
2:25 – 3:40 pm	**Tax Update – Dealer Property vs. Investment Property and Installment Sales** ***Justin Dodge*** ***Clay Sparks*** EKS&H LLLP	• Factors to consider: Real estate investments, historic rehab credits, and the changing laws in Colorado • Helpful case law • Creative structures to maximize capital gain • Real estate transactions for capital gains and ordinary losses – dealer vs. investor
3:40 – 4:30 pm	**Colorado's Housing Crisis** ***Brady Iandiorio*** Richmond Sprouse LLC	• Legislative history and update • Construction defects role • Miniscule inventory of condos and multi-family housing

SPEAKERS

Justin Dodge, CPA is a partner in the tax service area of EKS&H LLLP. He has 18 years of public accounting experience representing clients in the hospitality, real estate, construction, manufacturing, and high-technology industries. Dodge assists clients with innovative planning and transactional work, including special allocations, 1031 exchanges, entity structuring, partnership rollups, mergers and acquisitions, distressed debt restructuring, and cost segregation.

Bill Humphrey, CPA is an expert in Self-Directed IRAs, HSAs and other tax-advantaged accounts, as well as the IRS codes pertaining to these investments. Humphrey has focused on income tax, auditing, tax-related real estate issues, and forensic accounting for more than 20 years. He received his Bachelors of Science degree in Business from the University of North Carolina, Chapel Hill, with a concentration in accounting and computer science.

Brady Iandiorio has been practicing law in Colorado since 2010. Since March 2014, Iandiorio's practice focuses on civil litigation, business law, commercial transactions, corporation, partnership, LLC and entity formation, real estate, land use, construction, and contracts. Iandiorio received his Bachelor of Arts degree in philosophy from Colorado College and his law degree from the University of Oregon, School of Law, in Eugene, Oregon.

Linda Garrett Levy, CPA has been an owner and principal in 1031 Solutions LLC, since 2002. In the first nine months of 2015, 1031 Solutions LLC has acted as the qualified intermediary for exchanges involving over $400 million in property sales. Levy's education includes a bachelor's degree in accounting, Master's Degree in Taxation, Law Degree, and LLM in Taxation, all from the University of Florida, as well as a Ph.D in Accounting from the University of Colorado.

Sean McDonald, CPA joined ACM after graduating from the University of Northern Colorado. During his nine years in public accounting, he has worked with clients in a variety of industries including financial services, manufacturing and distribution, technology and real estate/hospitality. McDonald has been responsible for the overall preparation, execution, and completion of audits and other attestation engagements. He takes an active role in supervising and training staff.

Jay Rollins is a managing principal and co-founder of JCR. He leads the firm strategy and investment policy. From 1999 to 2005, Rollins was a managing director at GMAC Commercial Mortgage and ran a $500 million high yield investment program. Rollins has a Masters of Business Administration specializing in finance, from George Washington University and a Bachelor of Science in Finance and Marketing from Virginia Tech.

Clay Sparks, CPA, is a Manager in the Tax Service Area of EKS&H LLLP. He has 10 years of public accounting experience and serves companies in a variety of industries including, commercial and residential real estate, construction, manufacturing, hospitality, and professional services. He has expertise in cost segregation, construction accounting, and tax planning strategies. Sparks received a Bachelor of Science Bachelor of Arts in Accounting from the University of Arizona.

Tim Stueven, CPA joined ACM after graduating from the University of Northern Colorado with a Bachelor's degree in Accounting. He brings nine years of public accounting experience to the following industries: real estate, oil and gas drilling and exploratory companies, mid-stream and down-stream energy clients, manufacturing, and retail. He is involved in both the corporate and employee benefit plan practice and has a unique understanding of all the issues companies face from an assurance perspective. Stueven is a member of the Council of Petroleum Accountants Societies.

Richard L. Wobbekind is Senior Associate Dean for Academic Programs, Associate Professor of Business Economics and Finance, and Executive Director of the Business Research Division at the Leeds School of Business at the University of Colorado at Boulder. He joined the faculty in the fall of 1985. He assumed his current position as associate dean in July of 2000. Dr. Wobbekind teaches MBA and executive students in macroeconomics, public policy, and entrepreneurship. He has received four awards for teaching excellence.