

2020 OZ Fall Virtual Conference Agenda

***subject to change**

All times ET

Pre-Conference Workshops

Tuesday, Oct. 20, 2020

1–5 p.m.

OZ 101: The Basics Workshop

Learning objectives:

- Define qualified opportunity funds, qualified opportunity zone property, and qualified opportunity zones business property
- Calculate the tax benefits under various scenarios
- Identify how the incentive works to connect investors with qualified opportunity zone businesses

Instructions delivery method: Group live

Program level: Basic

Prerequisites: None

Advance preparation required: None

Recommended field of study: Taxes

Recommended CPE credits: 4

Wednesday, Oct. 21, 2020

1 –5 p.m.

OZ 201: Overcoming Obstacles Workshop

Learning objectives:

- Identify challenges in planning, financing, and compliance in OZs
- Identify best practices for addressing challenges in OZs
- Identify best practices for managing and deploying debt and equity proceeds within the structure, including timing and incentive compliance concepts.

Instructions delivery method: Group live

Program level: Intermediate

Prerequisites: A basic understanding of the OZ incentive

Advance preparation required: None

Recommended field of study: Taxes

Recommended CPE credits: 4

Thursday, Oct. 22, 2020

Noon–12:15 p.m. ET

Welcome and Keynote Address

No CPE provided.

12:15–1:15 p.m.

The Washington Report

Learning Objective(s):

- Identify possible effects of the upcoming election on the opportunity zones incentive

Instructional delivery method: Group live

Program level: Update

Prerequisites: A basic understanding of the opportunity zones incentive

Advance preparation required: None

Recommended field of study: Specialized knowledge

Recommended CPE credits: 1

1:15–1:30 p.m.

Networking Break

1:30–2:30 p.m.

Fund Sponsors Speak Structuring and Fundraising

Learning Objective(s):

- Identify strategies for structuring and fundraising for OZ investments, and identify which factors are currently influencing investors

Instructional delivery method: Group live

Program level: Intermediate

Prerequisites: A basic understanding of the opportunity zones incentive

Advance preparation required: None

Recommended field of study: Specialized knowledge

Recommended CPE credits: 1

2:30–2:45 p.m.

Networking Break

2:45–3:45 p.m.

Opportunities and Obstacles for the High-Net-Worth Investor

Learning Objective(s):

- Identify risks, rewards, and key considerations for making an investment in the OZ incentive

Instructional delivery method: Group live

Program level: Intermediate

Prerequisites: A basic understanding of the opportunity zones incentive

Advance preparation required: None

Recommended field of study: Specialized knowledge

Recommended CPE credits: 1

3:45–4 p.m.

Networking Break

4–5 p.m.

Managing Transaction Risk

Learning Objective(s):

- Identify best practices to minimize transaction risk before and after closing

Instructional delivery method: Group live

Program level: Intermediate

Prerequisites: A basic understanding of the opportunity zones incentive

Advance preparation required: None

Recommended field of study: Specialized knowledge

Recommended CPE credits: 1

5–5:30 p.m.

Face 2 Face Mixer

No CPE provided.

Friday, October 23, 2020

11:30 a.m. – Noon

Face 2 Face Mixer

No CPE provided.

Noon–1 p.m.

Opportunities for Operating Businesses

Learning Objective(s):

- Identify best practices for structuring investments to maximize investor benefits and create community impact

Instructional delivery method: Group live

Program level: Intermediate

Prerequisites: A basic understanding of the opportunity zones incentive

Advance preparation required: None

Recommended field of study: Specialized knowledge

Recommended CPE credits: 1

1–1:15 p.m.

Networking Break

1:15–2:15 p.m.

Leveraging OZ for Lasting Impact

Learning Objective(s):

- Identify best practices for harnessing the power of OZ to sharpen community focus to attract investment capital and achieve lasting impact

Instructional delivery method: Group live

Program level: Intermediate

Prerequisites: A basic understanding of the opportunity zones incentive

Advance preparation required: None

Recommended field of study: Specialized knowledge

Recommended CPE credits: 1

2:15–2:30 p.m.

Networking Break

2:30–3:30 p.m.

The Road Ahead–What the Future Holds for Opportunity Zones

Learning Objective(s):

- Identify ways the OZ incentive is expected to evolve and change, including potential legislation, IRS guidance, and investment types

Instructional delivery method: Group live

Program level: Intermediate

Prerequisites: A basic understanding of the opportunity zones incentive

Advance preparation required: None

Recommended field of study: Specialized knowledge

Recommended CPE credits: 1

3:30–4:30 p.m.

Face 2 Face Mixer

No CPE provided.

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