



**2021 AGENDA-AT-A GLANCE**

**Opportunity Zones**

**Spring Virtual**

**Conference**

## Preconference

\*Times ET and subject to change

**April 19, 2021**

**Noon-4 p.m.**

### **OZ Basics Online 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 internet

Program level: Basic

Prerequisites: None

Advance preparation required: None

Recommended field of study: Taxes

Recommended CPE credits: 4

**April 20, 2021**

**Noon-4 p.m.**

### **OZ Beyond the Basics Online 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.
- Identify implemented and proposed amendments to the regulations as a response to COVID-19

Instructions delivery method: Group internet

Program level: Intermediate

Prerequisites: A basic understanding of the OZ incentive

Advance preparation required: None

Recommended field of study: Taxes

Recommended CPE credits: 4

# Conference Day 1

\*Times ET and subject to change

**Thursday, April 22, 2021**

**Noon-12:15 p.m.**

## **Navigation and Networking How-To**

No CPE Offered

**12:15-12:30 p.m.**

## **Welcome Address**

No CPE Offered

**12:30-1:30 p.m.**

## **Washington Wire**

Learning Objective(s):

- Identify possible actions and communications coming from Congress, Treasury, and the IRS regarding the opportunity zones incentive

Instructional delivery method: Group internet

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

**1:45-2:45 p.m.**

## **State of the Opportunity Zone Marketplace**

Learning Objective(s):

- Identify challenges and solutions identified by seasoned OZ stakeholders, as well upcoming opportunities using the OZ incentive

Instructional delivery method: Group internet

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

3-4 p.m.

### Investing for Impact

Learning Objective(s):

- Identify the types of investments that are having a positive social impact in Opportunity Zones and how fund managers can easily track and measure their impact

Instructional delivery method: Group internet

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

4:15-5:30 p.m.

### QOF Spotlight

No CPE Offered

## Conference Day 2

\*Times ET and subject to change

**Friday, April 23, 2021**

Noon-1 p.m.

### Structuring OZ Investments

Learning Objective(s):

- Identify strategies for structuring opportunity zone investments including recommended practices for structuring single-asset investments and multi-asset investments plus REITS
- Differentiate between various OZ structures and how they best align with different business objectives

Instructional delivery method: Group internet

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

**1:15-2:15 p.m.**

**TECH Talk with Tax Professionals**

Learning Objective(s):

- Identify complex legislative and regulatory requirements of OZ, and identify best practices to address rules that lack clarity

Instructional delivery method: Group internet

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

**2:30-3:30 p.m.**

**Benefits and Considerations for Private High-Net-Worth Investors and Family Offices**

Learning Objective(s):

- Identify benefits of OZ investments, how your estate plan can benefit from OZ investments and why OZ investments are a viable alternative to 1031 investors

Instructional delivery method: Group internet

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

**3:45-5 p.m.**

**QOF Spotlight**

No CPE Offered

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Excluding pre-conference workshops, it is possible to obtain a maximum of 6 credits at this conference.