

Agenda
52nd National Premium Tax Conference
Fort Lauderdale
November 12th – 15th, 2024

The Steering Committee welcomes you to use this agenda for 2024 NPTC travel planning.

The 2024 NPTC Chairperson is Fran O’Loughlin, Deloitte Tax LLP
folouglin@deloitte.com

The 2024 NPTC Agenda Chairperson is Josie Lowman, Ryan LLP
josie.lowman@ryan.com

The 2024 NPTC Conference Coordinator is Jan Gillerin, NPTC
nptcreno@gmail.com

Please email Jan with your registration and hotel specific inquiries.

Cordially yours,

THE STEERING COMMITTEE

Gene Capobianco Jim Closson Jessica Fahey Josie Lowman
Jerry Malanga
Lisa McCalla Fran O’Loughlin Mike Palm George Ryan David Sutera

Your registration fee includes breakfast on Wednesday, Thursday and Friday; lunch on Wednesday and Thursday; and opening reception on Tuesday evening. Breakfasts and lunches are for registered attendees only. Your 21+ traveling companion is welcome at the opening reception.

Tuesday, November 12th

3:30 pm – 5:30 pm **Registration Intracoastal Ballroom Foyer North**

6:30 pm - 8:30 pm **Opening Reception POOLSIDE PATIO**
Your 21+ traveling companion is welcome to join us.

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Wednesday, November 13th

7:00 am - 8:15 am
7:30 am – 3:30 pm

**Breakfast Grand Intracoastal Ballroom ABC
Registration Intracoastal Ballroom Foyer North**

8:30 am – 9:00 am
classroom

Brief Welcome/Conference Announcements In Each

9:00 am – 5:00 pm

**Breakout Sessions Tier One: Grand Ballroom E
Tier Two: Grand Ballroom D**

	Tier One – Beginner	Tier Two - Advanced
9:00am - 10:30am	What is Insurance? Operations, Products, etc.	Mergers & Acquisitions
10:30am -10:45am	Break	Break
10:45am - 12:15pm	Beginning Premium/Muni Tax	Tax Audits and Controversy
12:15pm - 1:30pm	Lunch – Intracoastal Ballroom	Lunch – Intracoastal Ballroom
1:45pm - 3:15pm	Beginning Retaliatory Tax	Advanced State Income Tax
3:15pm - 3:30pm	Break	Break
3:30 pm - 5:00 pm	Intro to Federal and State Income & Other State Taxes	Advanced Retaliatory Tax

5:00 pm – 6:00 pm: Speakers Reception: The NPTC Steering Committee thanks the volunteer speakers for the time and knowledge they have committed to the conference. The volunteer speakers and panelists are invited to this private reception. Location will be announced at the NPTC.

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Thursday, November 14th

7:00 am – 8:15 am	Breakfast Intracoastal Ballroom ABC
8:15 am – 8:30 am	Conference Announcements
8:30 am – 9:45 am	2024 Developments in Legislation and Litigation
9:45 am – 10:00 am	Break
10:00 am – 11:15 pm	National Trends in State Taxation of Insurance Companies
11:15 am – 12:30pm	Automation Trends
12:30 pm – 1:45 pm	Lunch Intracoastal Ballroom ABC
1:45 pm – 3:00 pm	Municipal Taxes
3:00 pm – 3:15 pm	Break
3:15pm – 4:30 pm	Credits: Operational-Incentive-Goodwill Pros/Cons/Accounting

Friday, November 15th

7:00 am – 8:30 am	Breakfast Intracoastal Ballroom ABC
8:30 am	Conference Announcements
8:30 am – 12:30 pm	Life Breakout Session
8:30 am – 12:30 pm	P&C Breakout Session
	There will be a ½ hour break around 10/10:30 for attendees to check out and get luggage.
12:30 pm	<i>All done! See you at the NPTC 2025!</i>