



When — Friday, December 13, 2019. Sign-in and breakfast begin at 8:00am; seminars begin at 8:30am
Where — Seattle University, Pigott Building (Albers School of Business & Economics), Room 103
Cost — \$150 (price includes 8 hours of CPE, parking, light breakfast, lunch and snack).

Retiring “Retirement”: Planning for Life After (and In-between) Paid Work

8:30am — 10:10am

Michelle A Fait

Clients have many options about how to save for their non-working years. Traditional retirement is evolving to meet new demands from younger clients, such as the FIRE movement and serial careers. Focusing on 401ks and IRAs, we'll review tax deferred, after-tax and tax-free savings options, including Roth conversions of IRAs, in-plan 401k Roth conversions, strategies for when you might want to use each, and details of completing Forms 8606.

Give Your Money Away, Pay Less Taxes

1:00pm — 2:40pm

Elena Pullen-Venema

This session will explore the Why's, When's and How's of talking to clients about charitable giving. We will discuss how as a “trusted advisor”, CPAs and EAs have unique opportunities to grow relationships with clients by helping them meet their charitable and legacy goals. Using case studies and group activities, the session will also provide a deep dive into the advantages of client donating diverse, non-cash assets and the use of complex gift structures.

IRS OIC Collections/Bankruptcy

10:20am — 12:00pm

Jennifer Gellner/Ken Weil

Jennifer will address IRS collection issues, appeals and navigating the judicial system. Right along those lines, Ken will guide us through on tax related issues when a taxpayer is facing bankruptcy.

Lunch

12:00pm — 1:00pm

The Aftermath of Sec. 199A Qualified Business Income Deduction

2:50pm — 4:30pm

Gary Pomeroy,

Now that taxpayers has a full year of Section 199A under their belt, join Gary as he guides us through regarding the Aggregation rules when small business owners have multiple businesses.? What is the best tax advantage for the taxpayer— it depends on the facts, aggregation may allow a taxpayer to claim a greater QBI deduction than if the wages and capital limitation was applied separately.

Michelle A Fait, MBA, CFP®, EA, CDFATM-Satori Financial LLC

Michelle, Founder of Satori Financial LLC, is a Certified Financial Planning practitioner (CFP®), with expertise in investments and tax, focusing on the planning needs of single professional women. She holds an MBA in Finance from Yale University and a bachelor's degree in Economics from U.C. Berkeley. She is also an Enrolled Agent, a Certified Divorce Financial Analyst, and believer that money doesn't buy happiness, even if you know where to shop.

Jennifer Gellner, LL.M— Principal of Gellner Law Group

She has helped low-income taxpayer before the IRS and unrepresented taxpayers in the United States Tax Court. Since 2000, she is an active member of the WA State Bar Association Section Tax Council. As a founding member of the Spokane County Bar Association's Solo and Small Practice Section, she mentors recent law school graduates.

Kenneth Weil, J.D, LL.M-Principal

Ken is a native of Alabama, graduate of the University of Alabama School of Law. He has been in solo practice since 1995— Law Office of Kenneth C. Weil. He served a member of the Tax Advisory Committee to the National Bankruptcy Review Commission, writes the annual update on new developments in tax and bankruptcy.

Gary Pomeroy, EA –Tax Manager with Jana W. Helmuth CPA

Gary is a former IRS instructor and auditor. He began working for the firm in 1996. Gary has over 23 years combined government and private experience in the field of taxation. He is an Enrolled Agent and is experienced in foreign taxation and audit representation. When Gary is not contemplating interpretations of the Internal Revenue Code he can be found baking his own bread and studying the world through the lens of his camera.

Elena Pullen-Venema-Community Foundation of Snohomish County

Elena Pullen-Venema has been with the Community Foundation of Snohomish County since 2013. As Director of Gift Planning, she works closely with individuals, families, and their professional advisors to help build tax friendly charitable giving options that create meaningful legacies and grow philanthropy throughout Snohomish County. Elena currently serves as Board President for the Snohomish County Estate Planning Council and Co-Chair of Leadership Development for the Association of African American Financial Advisors. With more than 20 years of experience in the nonprofit sector, Elena also has her MBA in Finance. In 2018 she received her Chartered Advisor in Philanthropy designation.

~ **Registration Deadline: December 5, 2019** ~

To register, please email Jani Medeiros at medeirj@seattleu.edu and include your name, company, email, phone number and if you need parking. Driving directions will be emailed to you.

Seminar Questions? Call:

Mary Hawkins 425-947-1234 mary@mhawkinscpa.com

Eleanor Siverts-Akerman 425-998-0240 eleanor@hutchcpa.com

Please send a check (Payable to Seattle University—Accounting Dept) for \$150 to:

**Seattle University
Attn: Jani Medeiros
901 - 12th Avenue
P.O. Box 222000
Seattle, WA 98122**

***think green-We encourage carpooling. Speaker material will be emailed 1 week prior to the seminar or when available**

Driving Directions to Seattle University-Pigott Hall

From I-5

Take the James St. exit off I-5 (coming from the north, exit 165; coming from the south, exit 164A). Turn east up the hill past Broadway until you reach 12th Avenue (.6 miles). Turn left at the light on 12th Avenue and proceed north two blocks to East Marion Street and turn left. The visitor parking lot information booth will be directly ahead. Stop for parking information and campus directions.

From I-90

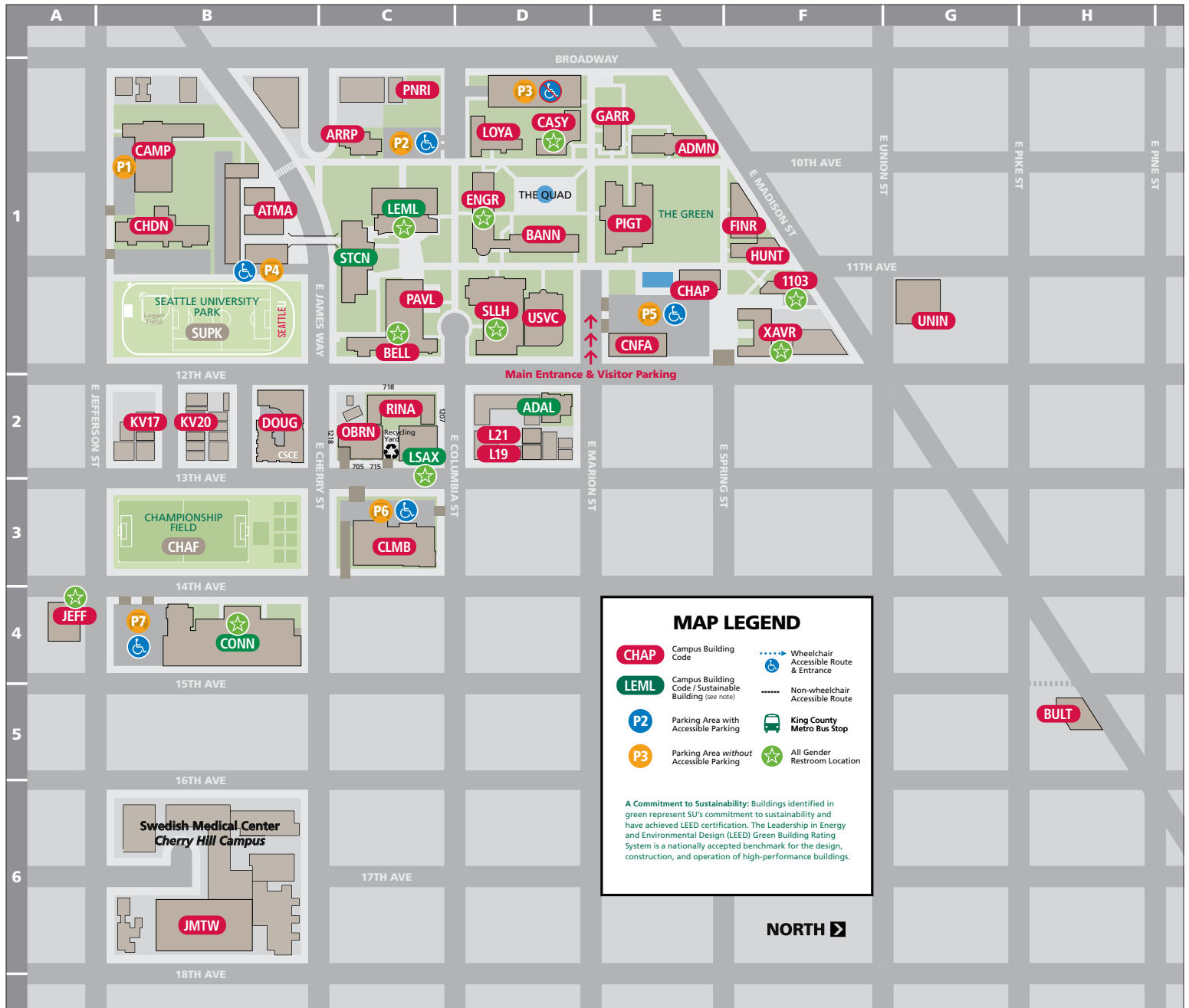
Take the Rainier Avenue North exit (3B) and merge onto Rainier Avenue South (you will be heading northbound). Follow Rainier Avenue South (.5 miles) to the intersection of Rainier Avenue South and Boren Avenue South. Turn slightly left onto Boren Avenue South for two blocks then turn right onto 12th Avenue. Follow 12th Avenue (.7 miles) to East Marion St. and turn left. The visitor parking lot information booth will be directly ahead. Stop at the booth for parking information and campus directions.

From Highway 520

Take 520 eastbound to I-5 south. Take the James Street exit off I-5 (exit 165a). Turn left on James Street and drive up the hill past Broadway until you reach 12th Avenue. Turn left at the light on 12th Avenue and proceed north two blocks to East Marion Street and turn left. The visitor parking lot information booth will be directly ahead. Stop at the booth for parking information and campus directions.

From Downtown Seattle

Take Madison or James eastbound. Go over I-5 and cross Broadway. If you're on Madison, turn right on 12th Avenue; if you're on James, turn left on 12th Avenue. The visitor parking lot is on the west (campus) side of 12th Avenue at East Marion Street. Stop at the booth for parking information and campus directions.



Building name, codes & popular destinations are listed on the back.
A high-contrast, black and white version of this map is available.

Campus Buildings and Areas

1103 Building	F1	1103
1313 East Columbia Building	C3	CLMB
1401 East Jefferson Building	A4	JEFF
Administration Building	E1	ADMN
Admissions & Alumni Building	D2	ADAL
Archbishop Murphy Apartments	B1	ATMA
Arrupe Jesuit Residence	C1	ARRP
Bannan Center for Science & Engineering, Engineering Building	D1	ENGR
Bannan Center for Science & Engineering, Science Building	D1	BANN
Bellarmino Residence Hall	C1	BELL
Bullitt Center	H5	BULT
Campion Residence Hall	B1	CAMP
Casey Building	D1	CASY
Championship Field	B3	CHAF
Chapel of St. Ignatius	E1	CHAP
Connolly Complex	B4	CONN
The Douglas	B2	DOUG
Fine Arts Building	F1	FINR

Garrand Building	E1	GARR
The Green	E1	
Hunthausen Hall	F1	HUNT
James Tower	B6	JMTW
Kolvenbach Residence 1217	B2	KV17
Kolvenbach Residence 1220	B2	KV20
Lee Center for the Arts	E1	CNFA
Lemieux Library & McGoldrick Learning Commons	C1	LEML
Logan Court 819 A,B,C	D2	L19
Logan Court 821 B,C	D2	L21
Loyola Hall	D1	LOYA
O'Brien Center	C2	OBRN
Pacific Northwest Research Institute	C1	PNRI
Pigott Building	E1	PIGT
The Quad	D1	
Recycling Yard	C2	
Rianna Building	C2	RINA
School of Law Annex	C2	LSAX

Seattle University Park	B1	SUPK
Student Center	B1	STCN
James C. Pigott Pavilion for Leadership	B1	PAVL
Sculpture Studio	G1	UNIN
Sullivan Hall	C1	SLLH
Teilhard de Chardin Hall	A1	CHDN
University Services Building	C1	USVC
Xavier Residence Hall	E1	XAVR

Parking Areas

10th & East Jefferson Lot	B1	P1
10th & East Columbia Lot	C1	P2
13th & East Cherry Lot	C3	P6
14th & East Jefferson Lot	B4	P7
Broadway Garage	D1	P3
Main Parking/Visitor Parking	E1	P5
Murphy Garage (below Murphy Apts)	B1	P4

Popular Destinations

for...

go to the...

Athletics/Recreation

Athletics	Connolly Complex	B4	CONN
Athletics Administration	O'Brien Center 1218 E. Cherry St. Entrance	C2	OBRN
Fitness / Recreation	William F. Eisiminger Fitness Center	B4	CONN

Collegiums & Learning Communities

The Link Learning Community	1103 Building	F1	1103
McGoldrick Collegium	Hunthausen Hall	F1	HUNT
Reidy Collegium	Student Center	C1	STCN
Tekakwitha Collegium	Student Center	C1	STCN

Event Spaces

Boeing Room	Lemieux Library & McGoldrick Learning Commons	C1	LEML
Campion Ballroom	Campion Residence Hall	B1	CAMP
Casey Atrium	Casey Building	D1	CASY
Casey Commons	Casey Building	D1	CASY
LeRoux Conference Center	Student Center	C1	STCN
PACCAR Atrium	Pigott Building	E1	PIGT
Pigott Auditorium	Pigott Building	E1	PIGT
Wyckoff Auditorium	Bannan Center for Science & Engineering, Engineering Building, East Entrance	D1	ENGR

Gallery Spaces

Hedreen Gallery	Lee Center for the Arts	E1	CNFA
Kinsey Gallery	Admissions & Alumni Building	D2	ADAL
Vachon Gallery	Fine Arts Building	F1	FINR

Schools & Colleges

Albers School of Business & Economics	Pigott Building	E1	PIGT
College of Arts & Sciences	Casey Building	D1	CASY
College of Education	Loyola Hall	D1	LOYA
College of Nursing	Garrand Building	E1	GARR
College of Science & Engineering	Bannan Center for Science & Engineering	D1	ENGR & BANN

for...

go to the...

Schools & Colleges continued

Matteo Ricci College	Casey Building	D1	CASY
School of Law	Sullivan Hall	D1	SLLH
School of Theology & Ministry	Hunthausen Hall	F1	HUNT

Services & Programs

Admissions Office	Admissions & Alumni Building	D2	ADAL
Alumni Office	Admissions & Alumni Building	D2	ADAL
Bookstore	University Services Building	D1	USVC
Campus Ministry	Student Center	C1	STCN
Career Services	James C. Pigott Pavilion for Leadership	C1	PAVL
Conference & Event Services	Columbia Building 1313 E. Columbia St. Entrance	C3	CLMB
Controller's Office	O'Brien Center 1218 E. Cherry St. Entrance	C2	OBRN
Center for Service & Community Engagement	Douglas Apartments 1223 E. Cherry St., Suite E	B2	DOUG
Facilities Services	1313 East Columbia Building	C3	CLMB
Human Resources	Rianna Building 718 12th Ave. Entrance	C2	RINA
Law Clinic, Ronald A. Peterson	School of Law Annex	D1	LSAX
Magis	James C. Pigott Pavilion for Leadership	C1	PAVL
Marketing & Communications	O'Brien Center 715 13th Ave. Entrance	C2	OBRN
Military Science, Department of	O'Brien Center 709 13th Ave. Entrance	C2	OBRN
Public Safety	University Services Building	D1	USVC
University Administration	Administration Building	E1	ADMN
University Advancement	Administration Building	E1	ADMN

Spiritual Spaces

Chapel of Saint Ignatius	Chapel of Saint Ignatius	E1	CHAP
Chardin Prayer Room	Teilhard de Chardin Hall	B1	CHDN
Ecumenical Chapel	Campion Residence Hall	B1	CAMP
Immaculate Conception Chapel	Administration Building	E1	ADMN
Multifaith Prayer Room	Campion Residence Hall	B1	CAMP