VSCPA
Virginia Society of CPAs
Tidewater Chapter

POST OFFICE BOX 418

NORFOLK, VA 23501-0418

PLEASE JOIN THE TCVSCPA FOR AN IN-PERSON EVENT ON RETIREMENT PLANNING!

DATE:.................................**Wednesday, November 2, 2022**

TIME:.. **8:00 am to 12:00 pm**
Breakfast/Registration 7:30 – 8:00 a.m.

PLACE:..**Crowne Plaza**
4453 Bonney Road
Virginia Beach, VA 23462

PRICE:.......................... **Tidewater Chapter Members – FREE**
(* Reservations Required)
Non-members - $75.00

Materials will be available at www.tcvscpa.com prior to the

RESERVATIONS

Please make your reservations
By 11:00 PM, Wednesday, October 26, 2022

Register online at: *www.tcvscpa.com*

Topics and Speakers

Four-hour CPE will cover “Various Retirement Plans, Administration, Compliance, Tax Changes and ESOPs”

Speaker 1: Justin Steil, UBS Financial Services
Speaker 2: Nicole Parnell, BDO

Future Events	
Governmental Update-What’s New for 2022	November 8, 2022
Key Issues for Trusts & Estates (VA)	November 10, 2022
Partnership & LLC Taxation I	November 17, 2022
Partnership & LLC Taxation II	November 22, 2022
Ethics – Navigating Client Needs & the Law	November 29, 2022

Tidewater Chapter, Virginia Society of Certified Public Accountants

SPECIALIZED KNOWLEDGE DAY

Wednesday, November 2, 2022

7:30–8:00………………………………………..…….**REGISTRATION CHECK-IN & BREAKFAST**

8:00–8:05…………………………………….……………...**WELCOME & ANNOUNCEMENTS**
President, Daniel S. Cook, CPA, CFP
TCVSCPA

8:05–9:45…………………………………………………**OPTIONS FOR RETIREMENT PLANNING**
Justin Steil, CIMA, CRPS
UBS Financial Services Inc.

Learn about the many types of tax advantaged retirement plans and factors to consider for their implementation. Will discuss IRA based plans, Qualified Plans and Cash Balance Pension Plans.

9:45-10:15……………………………………………………………………………………**BREAK**

10:15 – 11:55…………………..……..……**ERISA COMPLIANCE, RECENT TAX CHANGES & ESOPs**
Nicole Parnell, CPC, QPA, QKC, QKA
BDO

Discuss ERISA compliance and administration considerations for qualified retirement plans, including the impacts of recent tax law changes. Additionally, will discuss the tax advantages and plan design opportunities with Employee Stock Ownership Plans.

SPEAKER BIOS

Justin Steil focuses on wealth management for time challenged professionals and consulting to corporate retirement plans as one of UBS Financial Services' specialized Senior Retirement Plan Consultants.

He is FINRA registered and hold Series 7 and 66 securities licenses as well as life and health insurance licenses. He earned the Chartered Retirement Plans Specialist® designation awarded by the College for Financial Planning to individuals who specialize in creating, implementing and maintaining retirement plans for businesses.

He holds the Certified Investment Management Analyst® certification, administered by the Investments & Wealth Institute and taught in conjunction with The Wharton School, University of Pennsylvania. The CIMA® certification is focused on investment manager analysis, portfolio theory, behavioral finance, portfolio construction, risk management and application of the investment consulting process.

Justin enjoys golfing, sailing the Harbor 20s at the Sail Nauticus Center and watching English Premier League soccer - Liverpool!

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Nicole Parnell is a managing director in BDO's Global Employer Services practice, leading the national Retirement Plan Services specialty group, which includes third party administration, actuarial services, and ERISA compliance & reporting. With more than 20 years of experience in the administration of Qualified Retirement Plans, she has technical experience in all facets of plan design, operation, and compliance.

Nicole's experience includes advising businesses across all industries and sizes on the implementation and administration of retirement plans, including, but not limited to, 401(k) profit sharing, cash balance, and employee stock ownership plans. She has extensive experience consulting with business owners and executives on the strategic and tax benefits of employee benefit plans.

Nicole enjoys food, wine & travel and is heading to France in December to visit different regions to further her passion. She enjoys spending time with friends & family, including spoiling her 3 grandchildren.