VSCPA
Virginia Society of CPAs
Tidewater Chapter

POST OFFICE BOX 418
NORFOLK, VA 23501-0418

PLEASE JOIN THE TCVSCPA FOR AN IN-PERSON EVENT

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DATE:.......................................**Wednesday, November 20, 2024**

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

PLACE:.............................**Holiday Inn Virginia Beach-Norfolk**
5655 Greenwich Road
Virginia Beach, VA 23462

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

Materials will be available at www.tcvscpa.com

RESERVATIONS

Please make your reservations
By 11:00 PM, Thursday November 14, 2024

Register online at: *www.tcvscpa.com/events/*

Future Events

2024 Specialize Knowledge Day (IN-PERSON!)	November 20, 2024
2024 New Businesses – Advising Clients on Related Tax Issues	November 21, 2024
2024 Schedules K-2 & K-3 – Why Even Partnerships and S Corporations with No Foreign Activities or Members	November 22, 2024
2024 SECURE Act 2.0 – Provisions Impacting Employers	November 26, 2024

Tidewater Chapter, Virginia Society of Certified Public Accountants

SPECIALIZED KNOWLEDGE DAY

Wednesday, November 20, 2024

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

8:00 – 8:05…………………………..………………...WELCOME & ANNOUNCEMENTS
President, Amber Shimp, CPA, MSA
TCVSCPA

8:05 – 8:55……………………..…………WHY ESOPs ARE BECOMING A FIRST OPTION
EXPLORING THE BENEFITS
Justin Tu, Director ESOP Advisory Services
BDO Capital Professionals

8:55 – 9:45…………….. NAVIGATING THE SECURE ACT: Insights for Qualified Retirement Plans in 2025
Nicole Parnell, CPC, QPA, QKC, QKA
BDO Global Employer Services

9:45 – 10:15…………………………..…………………………………..………..BREAK

10:15 – 11:05…………… ACA REFRESHER AND PRINCIPLES OF SELF FUNDING FOR SMALL AND MEDIUM ENTITIES
David Messinger.
Towne Benefits

11:10 – 12:00……………………. IRA PLANNING POST SECURE ACT: A REVIEW OF JULY 2024 IRS GUIDANCE AND 5 PLANNING OPPORTUNITIES
Bryan Rex, CFP, Accredited Investment Fiduciary, ChFC
Cornerstone Financial Services, Inc.

Justin Tu has more than ten years of public accounting and investment banking experience, with a focus on executing ESOP transactions. He has advised middle-market companies and their shareholders on leveraged ESOP formation, acquisition financing, and management buyouts in a variety of industries. Prior to joining BDO Capital Advisors, Justin served as a tax senior manager in BDO USA's Global Employer Services practice where he consulted on leveraged ESOP transactions. He began his career in the assurance practice at BDO USA.

Nicole Parnell is a Principal 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 is a technical leader in all facets of plan design, operation and compliance. Nicole has presented on Qualified Plan Administration Topics including at the Virginia Society of CPAs Training as well as at BDO's national Training Conferences.

David Messinger is a CPA and member of the AICPA. He earned his bachelor's degree in accounting from the University of Miami, and received his master's in taxation from VCU. David started his career working for two national CPA firms in Manhattan. He ran numerous audit engagements and agreed upon procedure engagements. David ended up focusing on specialty lenders.

David was eventually hired by ADP, LLC during the ACA transitional period. David became a subject matter expert within the employee benefits technology space and was primarily charged with implementing solutions to assist clients in navigating the changing employee benefits landscape.

David decided to continue his corporate career at Towne Benefits where he has found a home for close to eight years. Currently, David is a Senior Vice President for Towne Benefits (Benefits Consultant). David works closely with prospective clients and clients within the middle market and national market space while removing obstacles for a team of successful Benefit Consultants.

Bryan Rex specializes in advanced IRA planning, with special attention given to the latest guidance from the IRS and US Tax Courts. With over 25 years of experience in wealth management and retirement planning, Bryan is dedicated to helping clients navigate the complexities of balancing financial security with desired growth. Bryan and his brother Adam are regularly involved in managing 401(k) and employer-sponsored plans, guiding owners, executives and participants through the intricacies of exit strategies, retirement savings and investment management. As a member of the family-owned firm, his expertise extends to long-term care and insurance-based solutions, ensuring that his clients are well-educated. He loves to work with his family as business partners!