Virginia Society of CPAs
Tidewater Chapter

POST OFFICE BOX 418
NORFOLK, VA 23501-0418

SAVE THE DATE !
The TCVSCPA will host an in-person continuing education event covering Tax Updates for 2025 and Beyond

Wednesday, October 22, 2025

Tentative Agenda

- **Review and Strategies- The One Big Beautiful Bill. Paullnye Nixon, CPA KPMG**
- **Estate Planning Suggestions and Developments Wells Fargo Advisors**
- **Elder Law Update – Angela Manz, ESQ**
- **Funding Long Term Care Insurance Needs- Jason Bozard and Adam Winfield, The Frieden Agency**

DATE:.................................**Wednesday, October 22, 2025**

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

R E S E R V A T I O N S

Please make your reservations
By 11:00 PM, Thursday October 16, 2025
Register online at: *www.tcvscpa.com/events/*

SPECIALIZED KNOWLEDGE DAY

Wednesday, October 22, 2025

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

8:00 – 8:05…………………………..………………..WELCOME & ANNOUNCEMENTS
President, Kenon Thomas, CPA, CFE
TCVSCPA

8:05 – 8:55…………………..…………………………...THE ONE BIG BEAUTIFUL BILL
Paullnye Nixon, CPA
KPMG

8:55 – 9:45…………………………….. EXIT PLANNING IDEAS AND SUGGESTIONS
Tim Rahr, CEPA & Fred Hughes
Wells Fargo Advisors

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

10:15 – 11:05………………………………………………………… ELDER LAW UPDATE
ANGELA MANZ, ESQ

11:10 – 12:00……………………. FUNDING LONG TERM CARE INSURANCE NEEDS
Jason Bozard & Adam Winfield
The Frieden Agency

Paullyne S. Nixon, Manager, Business Tax Services KPMG. Studied Accounting and Information Systems at Virginia Commonwealth University. She has been at KPMG for six years.

Tim Rahr, CEPA, Wells Fargo and Company**.** Tim is a lead strategist with the Business Owner Advisory Group within Wells Fargo. He advises business owners about ownership transition alternatives. Tim earned his bachelor's degree at Middlebury College, and completed executive education courses at the Wharton School of the University of Pennsylvania. Tim and his family live in New Haven, CT.

Fred Hughes, Senior Financial Advisor, Managing Director - Investments – Wells Fargo Advisors. Fred works with a select group of individuals, families, business owners, endowments and foundations to build, manage, protect and transfer wealth. He received his bachelor's degree from the State University of New York at Plattsburgh, and an MBA from the William and Mary Mason School of Business. He is the immediate past president of the Ronald McDonald House Charities of Norfolk.

Angela N. Manz, Esq. is the leader of the Manz Law Firm, with the key purpose of helping clients achieve two main goals: planning for the future and coping during times of crisis. Angela graduated Magna Cum Laude from the University of North Carolina, Charlotte; and received her Juris Doctorate at the William and Mary Marshall Wythe School of Law. She is a member of the Virginia and National Academies of Elder Law Attorneys.

Jason Bozard, Registered Investment Advisor, Jason graduated from Virginia Tech. He has been in business management and finance for 27 years. The past 16 years have been with Frieden Wealth Management.

Adam Winfield, Investment Advisor, Adam graduated from Virginia Tech. He focuses on wealth protection through tools including life, disability and long-term care insurance. He has been with Frieden Wealth Management since 2014.