

# NAREC 2024 ANNUAL FINANCIAL & TAX CONFERENCE

JUNE 19-21 | Hotel Bardo | Savannah, GA

Join us as we learn from top experts the latest business, financial and tax strategies and trends impacting the real estate industry. It's a wonderful opportunity to "meet and mingle" with real estate financial professionals from across the country.



**NAREC**

REAL ESTATE FINANCE  
PROFESSIONALS

Earn  
20.0 CPE

## HOTEL INFORMATION

Hotel Bardo | 700 Drayton St. | Savannah, Georgia | Reservations: 912.238.5158

Call the hotel by June 2 to book your room at the \$269/night rate + \$20 resort fee.

A discounted rate of \$419 will be honored for the weekend post conference, based on availability.

## THANKS TO OUR SPONSORS!



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# CONFERENCE SCHEDULE

## WEDNESDAY, JUNE 19

8:00 – 8:45 am	BREAKFAST & REGISTRATION	
8:45 – 9:00 am	Annual Meeting of Members and Conference Kickoff Renea Burns, NAREC President	
9:00 – 10:15 am	GAAP Technical and Regulatory Update Mike Foley, US RE Industry Professional Practice Sr Manager, Deloitte Hero Alimchadani, RE Industry Deputy Professional Practice Director, Deloitte	CPE: Accounting
10:15 – 10:30 am	NETWORKING BREAK	
10:30 - 11:45 am	Economic Update Scott Cullins, Sr. Manager - Transaction RE, Ernst & Young	CPE: Economics
11:45 – 1:00 pm	LUNCH Transformation of an Historic Hotel Pritpal Singh, COO, Left Lane Development	CPE: Spec. Knowledge
1:00 – 2:15 pm	How AI is Changing Audit, Tax and Real Estate David Fisher, Associate Director, KPMG	CPE: Info. Technology
2:15 – 2:30 pm	NETWORKING BREAK	
2:30 – 3:45 pm	Tax Update Brian Newman, Partner, Cohn Reznick	CPE: Taxes
3:45 - 5:00 pm	Real Estate Industry Hot Topics Moderators: David Sanders, Tax Partner, Deloitte Tax Sheryl Troiani, CAO, Granite Properties	CPE: Taxes
5:00 - 6:30 pm	COCKTAIL RECEPTION AT HOTEL Dinner on your own.	

## THURSDAY, JUNE 20

8:00 – 8:30 am	BREAKFAST	
8:30 - 9:45 am	The Rise of Proactive Assurance Ben Quigley, Principal, Baker Tilly Andrew McCauley, Partner, Baker Tilly	CPE: Accounting
9:45 - 10:00 am	NETWORKING BREAK	
10:00 -11:15 am	Debt Restructuring & Workouts: What to Expect? Moderator: Eric Emrich Joe Scalio, Sr. Lead Tax Partner, KPMG Zach Wilson, Partner, Arnall Golden Gregory	CPE: Accounting

11:15 - 12:30 pm	Property Trends Steig Seaward, Sr. National Director of Research, Colliers	CPE: Spec. Knowledge
12:30 – 1:30 pm	LUNCH	
1:30 – 2:45 pm	Talent, Leadership & Succession Planning Brett Addis, Director, Moss Adams	CPE: Business Mgmt & Org
2:45 – 3:00 pm	NETWORKING BREAK	
3:00 – 4:15 pm	Washington & Legislative Update Ken Kies, Managing Director, Federal Policy Group	CPE: Taxes
5:00 - 7:30pm	OFF-SITE TOUR & COCKTAILS We'll jump on a trolley for a short tour of the downtown area before visiting the Prohibition Museum - a perfect venue for cocktails! Dinner on your own.	

FRIDAY, JUNE 21

7:30 - 8:00 am	BREAKFAST	
8:00 - 9:00 am	The Savannah Scene Stacy Watson, Director-Economic & Industrial Development, Port of Savannah	CPE: Spec. Knowledge
9:00 – 9:15 am	NETWORKING BREAK	
9:15 – 10:30 am	Internal Audit Trends Doug Mims, Partner, CRI	CPE: Auditing
10:30 - 11:45 am	ROUNDTABLES 1) Reconciliation Tools 2) Tax Efficient Real Estate Investment Exchanges 3) Pros & Cons of Accounting Software (MRI, Yardi & Others)	CPE: Spec. Knowledge

CONFERENCE ENDS

Save the Dates:  
2024 Financial Management & Operations Conference  
December 5 & 6 | The Westin | The Woodlands, Texas

2025 Annual Tax & Financial Conference  
June 18-20 | Hotel Terra | Jackson Hole, Wyoming

## REGISTRATION INFORMATION



### Conference Fees for 20.0 CPE Hours

NAREC Member	\$1,100	_____
Non-Member	\$1,500	_____
Spouse/Guest*	\$350	_____

\*Welcomes participation in breakfasts, lunches, reception and off-site event.

To register, send this form with your check payable to NAREC to:

NAREC • 5709 Topsail Greens Dr • Chattanooga, TN 37416

Or register online using a MasterCard or Visa at: [www.NAREC.org](http://www.NAREC.org) (click on the Conferences tab)

Registration deadline is May 31, 2024.

First Name

Last Name

Badge Name (if different)

Title

Company Name

Company Address

City

State

Zip

Phone

E-mail address

Spouse/Guest Name

List any dietary restrictions

TOTAL ENCLOSED \$ \_\_\_\_\_



NAREC is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: [www.nasberegistry.org](http://www.nasberegistry.org).

Learning Objective: At this conference, you will enhance your knowledge of the real estate industry while learning practical applications and updates on emerging accounting, tax and technology issues including current GAAP and tax changes, update on current Washington legislative issues dealing with real estate, and an update on the state of the real estate sector. Additionally, there will be an in-depth discussion of AI applications and tax and accounting considerations relating to Debt Restructurings.

Program Level: Update

Prerequisite: A knowledge of the financial workings of the real estate industry. No advanced preparation required.

Delivery Method: Group Live

CPE total for Conference 20.0

Refund/Cancellation Policy: Conference registration fees are not refundable after May 31. Refund requests should be sent by email.

Please contact the NAREC office at [info@narec.org](mailto:info@narec.org) regarding any concerns or questions.