

NAREC 2025 ANNUAL TAX & FINANCIAL CONFERENCE SCHEDULE

JUNE 18-20 | HOTEL TERRA | JACKSON HOLE, WY

TUESDAY, JUNE 17

5:30-6:30pm WELCOME RECEPTION AT THE VILLAGE LAWN

WEDNESDAY, JUNE 18 - General Sessions will be in the Murie Ballroom at Hotel Terra

8:00 – 8:45 am	BREAKFAST & REGISTRATION - Murie Foyer / Albright / Lawn
8:45 – 9:00 am	Annual Meeting of Members and Conference Kickoff Renea Burns, NAREC President
9:00 – 10:15 am	Accounting and Regulatory Update Mark Wojteczko, Audit Managing Director, Deloitte & Touche Abby Shelley, Audit Manager, Deloitte & Touche
10:15 – 10:30 am	NETWORKING BREAK
10:30 - 11:45 am	Economic Update Scott Cullins, Sr. Manager, Ernst & Young
11:45 – 1:00 pm	LUNCH: CFO Strategy: Shaping the Future of Finance - Spur Restaurant TML McRae Thompson, Sr. Managing Director, FTI Josh Herrenkohl, Sr. Managing Director, FTI
1:00 – 2:15 pm	Private Credit Investment Funds Eric Emrich, CFO, Lubert-Adler Joe Scalio, Partner, KPMG
2:15 – 2:30 pm	NETWORKING BREAK
2:30 – 3:45 pm	Tax Update & Policy Post Election Gerhard H. Muelheims III, Sr. Manager, Moss Adams
3:45 - 5:00 pm	Real Estate Industry Hot Topics David Sanders, Tax Partner, Deloitte Tax Sheryl Troiani, CAO, Granite Properties
6:00 - 9:00 pm	We'll be walking to the Bridger Gondola to enjoy dinner at the Rendezvous Lodge.



THURSDAY, JUNE 19

8:00 – 8:30 am	BREAKFAST Murie Foyer / Albright / Lawn
8:30 - 9:45 am	Unlocking Tax Advantaged Growth Tracey Nguyen, Principal, Baker Tilly
9:45 - 10:00 am	NETWORKING BREAK
10:00 -11:15 am	Capital Market Update Josh Talberg, Managing Director, JLL Capital Markets
11:15 - 12:30 pm	Fair Value Steve Gottlieb, Managing Director, ForvisMazars

12:30 – 1:30 pm	BUFFET LUNCH Spur Restaurant TML
1:30 – 2:45 pm	Internal Audit Trends Today in Fraud & Cybersecurity Ryan Hodapp, Senior Manager - Technology Risk, Ernst & Young
2:45 – 3:00 pm	NETWORKING BREAK
3:00 – 4:15 pm	Blocker Corporations - Audit, Tax & Legal Considerations Joe Scalio, Sr. Lead Tax Partner, KPMG Zach Wilson, Partner, AGG
5:00 - 9:30pm	OFF-SITE EVENT Saddle up for a night out at the iconic Million Dollar Cowboy Bar! We'll ride on over to downtown Jackson Hole for cocktails and appetizers! Shuttles will loop to/from the hotel until 9:30pm.

FRIDAY, JUNE 20

7:30 - 8:00 am	BREAKFAST - Murie Foyer / Albright / Lawn
8:00 - 9:15 am	Purchase Price Allocations EJ Edelman, Partner CohnReznick Ryan Mills, Partner, CohnReznick
9:15 – 9:30 am	NETWORKING BREAK
9:30 – 10:30 am	The Wyoming Way Rick Howe, President, Jackson Hole Chamber of Commerce
10:30 - 11:45 am	ROUNDTABLES Data Strategy - Patrick Mackey, Compatriot Capital Accounting Software: Pros & Cons - Peter Ulstad, Weston Practical Uses of AI Now - Jennifer Eager, Noble Investment Group & Janelle Hielscher, Sherman Associates

CONFERENCE ENDS

Save the Dates:

2025 Financial Management & Operations Conference | November 4 & 5 | Hermitage Hotel | Nashville, TN
2026 Annual Tax & Financial Conference | June 16-18 | L'Auberge Del Mar | Del Mar, CA

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