

2021

STATE
TAX
SYMPOSIUM

Virtual Program presented by

Maine Revenue Services

Thursday, September 23, 2021

8:00 am - 5:00 pm





State Tax Symposium

Overview

This one-day event will cover recent Maine tax updates and current agency highlights.

Register

Register at bit.ly/3zguG67

\$10 nonrefundable fee for each registrant.

Who Should Attend?

Taxpayers, Tax Professionals, Accountants, Enrolled Agents, CPAs, Tax Attorneys, Financial Planners and others who need to keep informed of changing and existing state tax laws.

Education Credits

9.6 hours of CPE credits

8 hours of CLE credits

Attendees must participate for the entire day. Partial credits are not available. The Symposium does not qualify for IRS CE credits.

MORNING

8:00 Welcome

Michael Fortin, Director, Maine Compliance Division

8:00 – 9:00 MRS's New Computer System: Impact on Taxpayers and Practitioners

Danny Reeves, Project Manager

9:00 – 9:45 State Income and Estate Tax Updates: Conformity, Unemployment Changes, and More

Daniel D'Alessandro, Attorney, Office of Tax Policy

Heather Popadak, Director, Maine Income/Estate Tax Division

9:45 – 10:00 Break

10:00 – 10:45 Property Tax Updates

Peter Lacy, Director, Maine Property Tax Division

10:45 – 12:00 Sales and Marijuana Taxes Updates

Alaina Patterson, Deputy Director

12:00 – 12:30 Break

12:30 – 1:15 Economic and Revenue Forecasting in the "unprecedented, highly uncertain, and rapidly changing" COVID-19 Recession

Michael J. Allen, Ph.D., Associate Commissioner, Department of Administrative & Financial Services

AFTERNOON

- 1:15 – 1:45 **Maine Legal Updates**
Alex Weber, General Counsel, Office of General Counsel
- 1:45 – 2:30 **State Tax Case Highlights**
Tom Knowlton, Deputy Attorney General, Maine Office of the Attorney General
Kevin Crosman, Assistant Attorney General, Maine Office of the Attorney General
Larry Delaney, Assistant Attorney General, Maine Office of the Attorney General
- 2:30 – 2:45 **Break**
- 2:45 – 3:30 **Legalized Marijuana in Maine**
David Heidrich, Director of Engagement and Community Outreach, Maine Office of Marijuana Policy
- 3:30 – 4:15 **Other Jurisdiction Credit**
Timothy Applegate, Tax Section Manager, Maine Income/Estate Tax Division
- 4:15 – 5:00 **Educational Opportunity Tax Credit (EOTC)**
Bryan Lumbr, Tax Section Manager, Maine Income/Estate Tax Division
- 5:00 **Conclusion**
Michael Fortin



Careers at MRS

The mission of MRS is to fairly and efficiently administer the tax laws of the State of Maine, while maintaining the highest degree of integrity and professionalism.

MRS is looking for smart, motivated, and team-oriented people to join our team. Benefits include:

- Public service
- Competitive salary
- MainePERS retirement plan and deferred compensation
- Qualifying employer for federal student-loan forgiveness
- Generous insurance and paid leave (including all state holidays)
- Flexible spending accounts and longevity pay
- Gym membership reimbursement
- Tuition reimbursement for continuing education

Regularly posted, full-time positions at MRS include the Tax Examiner and Revenue Agent positions.

Click the following link for more information about these positions: <https://apps.web.maine.gov/cgi-bin/bhrssalary/jobs.pl>

Current job openings at MRS are listed here: www.maine.gov/revenue/about/career-opportunities



Frequently Asked Questions

Will the Symposium be recorded?

Yes. Registrants who are unable to attend the entire day may view a recording of the program. A link will be sent to all attendees shortly after the event has concluded.

Note: viewing the recording does not qualify for earning CPEs or CLEs.

Will presentation materials be available for download?

Yes. Presentation materials will be posted to the MRS website shortly after the Symposium has concluded. A link will be sent to all attendees.

When will I receive my Certificate of Completion for CPEs or CLEs?

After MRS has verified attendance and confirmed that a vote has been entered after each presentation, attendees who have fully participated in the Symposium will receive a Certificate of Completion via email within 5-10 business days. **IMPORTANT:** Please enter your complete and accurate first and last name and email address in Zoom, as this will be used to verify your attendance for CPEs and CLEs. If you are a regular Zoom user, you may not be prompted to enter your name. Please confirm your name in Zoom by clicking on the "Participants" button at the top of the Zoom window. Next, locate your name and confirm your first and last name have been entered correctly. If you need to change it, hover your mouse over your name in the participants list on the right side of the Zoom window. Then, click on "Rename" to make corrections and click "OK."

I cannot attend the entire day. Can I receive partial credit?

No. You must attend the entire day in order to receive a Certificate of Completion for CPEs or CLEs.

What happens if the Poll Question does not show on my screen?

During the Symposium, attendees will be asked to respond to a poll question at the end of each presentation. Zoom users who have the pop-up blocker in their web browser turned on may not see the poll question. Therefore, prior to the Symposium, check your web browser application to make sure the pop-up blocker feature has been turned off. Infrequently, some users reported that keeping the Q/A window open throughout the event can affect the polling question. Therefore, please keep the Q/A window closed, unless you are posing a question. If you miss one vote due to a technical difficulty, this will not impact your Certificate of Completion.

Can I call into the Symposium from my phone?

No. Attendees must use an Internet-enabled device such as a tablet, smart phone, or computer to participate in the Symposium. Attendees are required to use the Zoom app to respond to poll questions at the end of each presentation.

What happens if my computer freezes, or I lose Internet—will I still get credit?

If you have any technical difficulties, please reboot your device and try to re-establish a connection as soon as possible. If you change devices or reboot, make sure you log in using the same link in the Eventbrite email, and confirm you are using your correct full name and email address. A short interruption with your device will not impact your Certificate of Completion.

How do I access the Symposium from my device?

After purchasing a ticket through Eventbrite, registrants will receive an Eventbrite confirmation email with a link to access the Symposium on September 23, 2021. Please save this e-mail. Upon entering the Symposium webinar, you will be asked to enter (or confirm) your name. IMPORTANT: Please enter your complete and accurate first and last name in Zoom, as this will be used to verify your attendance for CPEs and CLEs. Please know that only our panelists can see your name listed as an attendee. The only time your name might be displayed to everyone is if you pose a question to one of our panelists.

May I ask questions during the Symposium?

During the Symposium, attendees may type questions to the presenters by using the Q/A tab at the bottom of the Zoom page. If there is time, the presenter will field as many questions as possible. The “Raise Hand” feature in Zoom will not be utilized at the Symposium.

Where can I find the Symposium brochure and agenda?

The Symposium brochure and agenda is posted on the Maine Revenue Services Website at www.maine.gov/revenue. Click on the link for the 2021 State Tax Symposium. Attendees may also visit the Eventbrite event page: <https://www.eventbrite.com/e/state-tax-symposium-2021-tickets-156295866143>