HELPFUL INFORMATION ABOUT OUR PROGRAM POLICIES AND DISCLOSURES

GENERAL INFORMATION

Early-Bird Discount: Register by July 31, 2025, and receive an additional $50 discount per registrant. Please note the discount is automatically applied at registration – no promo or discount code is required.

Group Pricing: Have a group of 50 or more attendees? Join our Premier Partner program and receive substantial discounts and more. For more info, please contact Michelle Petrus at, m.petrus@taxforums.com or 800-286-4760. Also note, in calculating group pricing, Tax Planning Forum registrants are priced before Fundamentals of Flow-Through registrants.

Licensing: Each person viewing the program is required to register.

Program Materials: All attendees will receive downloadable copies of exhibits, outline and treatise. Limited quantities of Forum and Fundamentals hard copies of the program exhibits and outline are available at cost inclusive of shipping ($110 per program).

Health-Related Protocols: For all 2025 in-person programs, Tax Forum has no health-related protocols at the present time. However, Tax Forum reserves the right both to create protocols and to change these protocols at any time. For those who are unable or unwilling to abide by any potential Tax Forum health-related protocols, we will re-register them for the most convenient virtual programs.

Cancellation Policy: Full refunds of program registration fees will be given (a) for virtual attendee cancellations received at least 10 days prior to the program first selected and (b) for in-person attendee cancellations received at least 30 days prior to the program subject to a $340 cancellation fee. There will be no refunds of program registration fees for cancellations after these dates. Substitutions from the same firm will be accepted at any time.

Program Cancellation: Program sponsors reserve the right to cancel a scheduled event for any reason or change content without further notice, with liability limited to a refund of registration fees for any rescheduled or cancelled program. Registration fees will be refunded for any rescheduled or cancelled program.

Q&A: Questions will be taken from attendees throughout the virtual programs (which include scheduled live Q&A sessions) and during and after the in-person programs. Two-day and three-day virtual programs each include a daily 45-minute lunch break.

Program Prerequisites/Level: The Forum is an advanced program designed to (a) provide participants with knowledge of tax planning opportunities using flow-through entities, (b) make participants aware of changes in the law impacting the use of flow-through entities and (c) become more knowledgeable of the tax rules that apply to flow-through entities. To get the most from this program, it is recommended that a participant have at least (i) two years of concentrated experience in flow-through taxation, or (ii) five years of general tax experience with a basic understanding of flow-through principles. Fundamentals of Flow-Through is an intermediate program designed to provide participants with a better understanding of the tax rules relating to the operation and use of flow-through entities and to make participants aware of changes in the law impacting the use of flow-through entities. A participant should have had some limited exposure to flow-through principles. No advance preparation is required for either program.

CPE/CLE Credit: We anticipate that the virtual programs should qualify for up to 20 hours and the in-person programs for up to 16 hours of CPE credit (based on NASBA certification). Each year, Tax Planning Forum LLC seeks to register each of its programs for CLE credit in states where CLE is mandatory, the number of hours of which vary by state. As approval of each program for CLE credit is governed by a variety of governing bodies and state agencies, no assurance can be provided that it will so qualify in your state. If you require CLE credit, we suggest that you contact us about the status of qualification of our programs for CLE credit in your state. (Note that CLE approval is pending in the state of California.)

NASBA Registration: Tax Planning Forum LLC 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.

IN-PERSON PROGRAM INFORMATION

Additional In-Person Fee: An additional $340 fee will be added to the base registration fee for each in-person program registration.

Schedule: 8:30am - 5:00pm (day one); 8:00am - 4:00pm (day two) (local time). Day one luncheon included.

Hotel Accommodations: Blocks of rooms will be held at the listed hotels until 30 days before each in-person program (subject to availability). (A portion of the room revenues will defray conference expenses.) To qualify for the room rates noted, please make your own hotel reservations, identifying yourself as a 2025 Tax Planning Forum registrant. Noted room rates do not include applicable taxes or resort fees.

Las Vegas
October 27-28, 2025 (Fundamentals of Flow-Through)
October 30-31, 2025 (Tax Planning Forum)
Flamingo Las Vegas Hotel & Casino
3555 Las Vegas Blvd South
Las Vegas, NV 89109
(888) 373-9855 (reference group code SFFUN5) or book your reservations online
$147/night (Saturday, October 25 through Saturday, November 1)

Orlando
December 11-12, 2025 (Tax Planning Forum)
Walt Disney World Swan
1200 Epcot Resorts Boulevard
Lake Buena Vista, FL 32830
(888) 828-8850 or book your reservations online
$295/night (Wednesday, December 10 through Sunday, December 14)

For questions or more information regarding administrative policies, please contact Customer Service at 1-800-286-4760. Customer support is also available at the Tax Forum website.