



The *CFO Knowledge Network* invites you to our next session:

WHEN: Friday October 27, 2017 from 8AM – 10AM

WHERE: Connecticut Innovations, 865 Brook Street, Rocky Hill, CT

SCHEDULE: 8:00 – 8:30 Continental Breakfast & Networking
8:30 – 10:00 Roundtable Discussion: *Tax Credit and Incentive Triggers*

DISCUSSION

LEADERS: **Bill Claffey**, Partner, Tax Services at Fiondella, Milone & LaSaracina LLP
Ryan V. Leichsenring, Counsel at Robinson & Cole LLP

SESSION SUMMARY:

As we all know, Connecticut's economy has been better. With high-profile corporate departures like GE and Aetna, the state is making every effort to attract and retain companies. Connecticut is not alone. Neighboring states, such as New York and Massachusetts, are also going to great lengths to provide incentives and credits to lure companies or entice them to stay.

As CFOs set their sights on planning for 2018, they need to be cognizant of the various business transactions and events that can trigger tax credit and incentive opportunities. Not all of these will be obvious. At our next session, *Tax Credit and Incentive Triggers*, our discussion leaders will explore some of the common and often overlooked initiatives that can yield significant tax savings. They will also address the process CFOs can employ to take full advantage of these credit and incentive opportunities. While much of the discussion will focus on Connecticut, comparisons will be drawn to programs offered in neighboring states.

This will be a roundtable discussion where ideas and questions from participating CFOs will be strongly encouraged. Please RSVP to Bill Bardani (bill.bardani@visionsearchpartners.com), Frank Milone (fmilone@fmlcpas.com) or Stephen Cooper (scooper@rc.com) as soon as possible as seating is limited.



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Discussion Leaders

Bill Claffey

Partner, Tax Services at Fiondella, Milone & LaSaracina LLP

Bill heads the firm's Tax Services Practice with a primary focus on income tax, sales tax, and federal and state credits and incentives. Bill's experience includes state income tax compliance and consulting, M&A tax diligence, transaction cost analysis, tax provision analysis, and credit and incentive identification and quantification. Bill also provides extensive sales/use tax consulting services which include analyzing the taxability of specific buy or sell side transactions, compliance assistance, and reverse sales/use tax audits. In addition to these services, Bill represents his clients at the federal and state level during tax audits and has turned many assessments into refund opportunities for his clients. Through his tax credit practice, Bill has saved his clients at FML over \$25m in federal and state taxes. Prior to joining FML, Bill had 9+ years of experience in the Stamford and Hartford Offices of Ernst & Young LLP.

Bill is a graduate of Providence College, received his J.D. from Quinnipiac University School of Law, and is a member of the Connecticut Bar.

Ryan V. Leichsenring

Counsel at Robinson & Cole LLP

Ryan is a counsel in Robinson & Cole LLP's Tax Group, where he represents clients in connection with a broad range of domestic and international tax matters, with a particular emphasis on multistate taxation issues, tax planning, enforcement and collection defense, and other federal and state tax controversies for both individuals and businesses. He represents clients before taxing agencies in audits and administrative litigation at the federal, state, and local tax levels.

Ryan has significant experience with federal and state tax laws that apply to tax-exempt organizations. He has counseled a variety of exempt organizations, both private foundations and public charities, with respect to structure and formation, application for recognition of exemption, information reporting, and unrelated business taxable income strategy and planning. His practice focuses on the constantly shifting tax rules specific to the health care industry.

Ryan is admitted to practice law in Connecticut. He is a member of the Connecticut Society of CPAs State Tax Committee as well as the Taxation Section of both the American Bar Association and the Connecticut Bar Association. Ryan also serves as a director on the boards of Lea's Foundation for Leukemia Research, Inc. and the Montessori School of Greater Hartford.

Ryan earned a bachelor of science degree in economics from the University of Pennsylvania, the Wharton School, magna cum laude, and a juris doctor degree from the University of Connecticut School of Law, with honors.



CFO Knowledge Network

The CFO Knowledge Network, founded by Bill Bardani and Alan Hurwitz, is a network of peer CFOs from small and middle market companies who share ideas and experiences about common challenges and current trends. Bill and Alan created the group to address the knowledge-sharing needs of financial executives who lack an internal peer network within their companies. Membership consists of senior financial executives who work in CT and NY.

The CFO Knowledge Network recognizes the sponsors who support the funding and planning of our sessions:



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