TAX UPDATE WEBINAR

Presented By

MM&R MATHIS MARIFIAN & RICHTER LTD ATTORNEYS AT LAW

Join the attorneys of Mathis, Marifian & Richter, LTD., as they discuss recent statutes, rulings, decisions and interpretations centering upon various federal and state tax issues. These topics cover updates, overviews and practical suggestions to assist you in various practice areas.

September 24, 2026

1:00 to 4:00 PM

ZOOM Webinar

Cost to Attend: Free

Please RSVP by 9.17.2026

RSVP by emailing membrich@mmrltd.com or by calling (618) 234-9800.

Participants will earn 3 CPE credits

Participants will have a better understanding and overview of the latest updates in the various subject matters that will be covered, as well as an ability to spot issues that may come to light through participation in the overview of a given topic.

TOPICS

Ethical Issues Using AI in Tax Practice | Preparer Penalties

Disclaimer Planning | Estate Planning for Farmers

Field of Study: Taxes | **Prerequisite**: None

Who Should Attend: Individuals practicing in the legal and accounting fields

Advanced Preparation: None | **Program Level**: Basic | **Delivery Method**: Group Internet Based

Learning Objectives:

Disclaimer Planning - Upon completion of this course, participants will be able to recognize the requirements of "qualified disclaimers" under the Internal Revenue Code and the opportunities to utilize disclaimers in pre-death and post-death tax plannings.

Estate Planning for Farmers - Upon completion of this course, participants will be able to use learned strategies to help mitigate Illinois and federal estate taxation upon the death of farm owners.

Ethical Issues Using AI in Tax Practice & Preparer Penalties - Upon completion of this course, participants will be able to evaluate the responsible implementation and use of AI within the legal and ethical limitations applicable to professional tax practitioners. In addition, participants will be able to evaluate the impact of recent court and administrative rulings on the interpretation and application of preparer penalties.

Refunds and Cancellations:

There is no fee for this seminar. For more information regarding cancellation and complaint policies, please contact Michael Embrich at membrich@mmrltd.com or (618) 234-9800.

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