

Wednesday, Oct. 23

9 a.m.-4 p.m.

Opportunity Zones Basics Workshop

Learning objectives:

- Define qualified opportunity funds, qualified opportunity zone property, and qualified opportunity zone business property
- Calculate the tax benefits under various scenarios
- Identify how the incentive works to connect investors with qualified opportunity zone businesses

Instructional delivery method: Group live

Program level: Basic

Prerequisites: None

Advance preparation required: None

Recommended field of study: Taxes

Recommended CPE credits: 6

Thursday, Oct 24

9:45-10:45 a.m.

The Washington Report

Learning objective:

- Identify possible actions and communications coming from Congress, Treasury and the IRS regarding the opportunity zones incentive

Instructional delivery method: Group live

Program level: Update

Prerequisites: A basic understanding of the opportunity zones program

Advance preparation required: None

Recommended field of study: Specialized knowledge

Recommended CPE credits: 1

11 a.m.-noon

Fund Sponsors Speak

Learning objective:

- Identify transactions that are of interest to opportunity fund sponsors.

Instructional delivery method: Group live

Program level: Intermediate

Prerequisites: A basic understanding of the opportunity zones program

Advance preparation required: None

Recommended field of study: Specialized knowledge

Recommended CPE credits: 1

Track 1: Opportunity Funds

1:45-2:45 p.m.

Structuring

Learning objective:

- Identify structuring issues to determine the best structure for your transaction.

Instructional delivery method: Group live

Program level: Intermediate

Prerequisites: A basic understanding of the opportunity zones program

Advance preparation required: None

Recommended field of study: Financing

Recommended CPE credits: 1

3-4 p.m.

Securities Laws and Opportunity Funds

Learning objective:

- Identify the impact of federal and state securities laws on investments in qualified opportunity funds.

Instructional delivery method: Group live

Program level: Intermediate

Prerequisites: A basic understanding of the opportunity zones program

Advance preparation required: None

Recommended field of study: Specialized knowledge

Recommended CPE credits: 1

4:10-5 p.m.

Benefits and Considerations for Private High-Net-Worth Investors and Family Offices

Learning objective:

- Identify the benefits of opportunity zones investing for family offices and private high-net-worth investors.

Instructional delivery method: Group live

Program level: Intermediate

Prerequisites: A basic understanding of the opportunity zones program

Advance preparation required: None

Recommended field of study: Specialized knowledge

Recommended CPE credits: 1

Track 2: Opportunity Zones Businesses

1:45-2:45 p.m.

Real Estate

Learning objective:

- Identify industry best practices for real estate used as opportunity zones investments.

Instructional delivery method: Group live

Program level: Intermediate

Prerequisites: A basic understanding of the opportunity zones program

Advance preparation required: None

Recommended field of study: Specialized knowledge

Recommended CPE credits: 1

3-4 p.m.

Operating Businesses

Learning objective:

- Identify suitable operating business types for opportunity zones, as well as common issues encountered in operating businesses.

Instructional delivery method: Group live

Program Level: Intermediate

Prerequisites: A basic understanding of the opportunity zones program

Advance preparation: None

Recommended field of study: Specialized knowledge

Recommended CPE credit: 1

4:10-5 p.m.

Combining Opportunity Zones with Other Federal Incentives

Learning objective:

- Identify ways to combine the opportunity zones incentive with other federal incentives.

Instructional delivery method: Group live

Program Level: Intermediate

Prerequisites: A basic understanding of the opportunity zones program

Advance preparation: None

Recommended field of study: Taxes

Recommended CPE credit: 1

Friday, Oct 25

9-10 a.m.

Open Questions on Guidance, Answered

Learning objective:

- Identify key issues from the Treasury's OZ guidance, as well as best practices for areas that still lack clarity.

Instructional delivery method: Group live

Program Level: Intermediate

Prerequisites: A basic understanding of the opportunity zones program

Advance preparation: None

Recommended field of study: Taxes

Recommended CPE credit: 1

10:10-11 a.m.

States of the States

Learning objective:

- Identify ways to maximize benefits by using state-level incentives that pair with opportunity zones.

Instructional delivery method: Group live

Program Level: Intermediate

Prerequisites: A basic understanding of the opportunity zones program

Advance preparation: None

Recommended field of study: Specialized knowledge

Recommended CPE credit: 1

11:10-Noon

How Communities Can Capitalize on Opportunity Zones

Learning objective:

- Identify strategies for local communities to maximize the impact of opportunity zones investments.

Instructional delivery method: Group live

Program Level: Intermediate

Prerequisites: A basic understanding of the opportunity zones program

Advance preparation: None

Recommended field of study: Specialized knowledge

Recommended CPE credit: 1

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