



# 2024 Fall Tax Symposium

Hosted by the Vermont Department of Taxes

Tuesday, October 22, 2024 | 9:30a.m. – 4:00p.m.

State Conference Room 110

111 State Street

Montpelier, VT

## SYMPOSIUM AGENDA

9:00–9:30 Registration, Coffee, and Networking for In-Person Attendees

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9:30–9:35 Welcome

**Presenter:** Deborah Carroll, Principal Assistant

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9:35–9:50 Introduction and Overview of the Year at the Department (15 minutes)

**Presenter:** Craig Bolio, Commissioner

**Summary:** Craig will provide a high-level overview of what the Department has been up to this year, what we're working on now, as well as short and long-term goals.

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9:50–10:40 The 2024 Legislative Session (50 minutes, 1 CPE Credit)

**Presenter:** Abby Shepard, Executive Policy Advisor

**Level:** Overview

**Prerequisite:** None

**Learning Objective:** Learn about 2024 legislative changes impacting tax professionals and their clients.

**Summary:** Abby will provide a high-level overview of 2024's legislative changes, including State property taxes, short-term rentals, property transfer taxes, local option taxes, cannabis taxation, communications taxes, landlord certificates, trust taxes, and reports and committees the Legislature assigned to the Department. Attendees will be asked to write down any questions they have pertaining to new laws and submit them after this session, as we'll take a deeper dive into some of these topics during an afternoon session.

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10:40–10:55 Morning Break

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**10:55-11:25 The New Child Care Contribution and Payroll Tax (30 minutes, .6 CPE Credits)**

**Presenter:** Adam Gann, Business Analyst Supervisor & Matthew Phillips, Assistant Attorney General

**Level:** Overview

**Prerequisite:** None

**Learning Objective:** Learn about guidance the department has created and how implementation of this new tax is going, as well as the impact on tax preparers and their clients.

**Summary:** Collection of the new Child Care Contribution began July 1, 2024. Are you sure that your clients are correctly collecting and remitting the CCC? Adam and Matt's discussion will include responsibilities and options for employers and what documentation we'll accept from self-employed taxpayers, and we'll allow time for answers to your questions.

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**11:25-11:45 A myVTax Tutorial, Including Helpful Tips for Tax Preparers (20 minutes, .4 CPE Credits)**

**Presenter:** Aaron Kaigle, VTax Director

**Level:** Basic

**Prerequisite:** None

**Learning Objective:** Learn about new features, forms, and functionalities in myVTax that tax professionals will find useful.

**Summary:** We're always working to make myVTax a useful tool for tax preparers and taxpayers. In this session attendees will learn about things that may make your jobs, as tax preparers, easier.

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**11:45-12:00 Compliance: Voluntary Compliance (15 minutes, .1 CPE Credits)**

**Presenter:** Alysha Leroux, Assistant Director, Compliance

**Level:** Basic

**Prerequisite:** None

**Learning Objective:** To advise preparers of voluntary compliance and utilization of the Voluntary Disclosure Program.

**Summary:** The Compliance division is continually looking to encourage voluntary compliance. Alysha will provide an overview of the Department's Voluntary Disclosure Program (VDP) and report on recent efforts to streamline the application process.

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**12:00–1:00 Lunch Networking at the Capital Café in the Vermont State House**

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**1:00-1:40 A Retrospective on the 2024 Filing Season, and What Tax Preparers Can Expect to see in 2025** (40 minutes, .8 CPE Credit)

**Presenters:** James Whitehouse, Director, Paul Brodowski, Taxpayer Services Section Chief & Lisa Pinkus, Section Chief

**Level:** Overview

**Prerequisite:** None

**Learning Objective:** Learn about the 2024 filing season and preview changes in store for 2025.

**Summary:** A review of the 2024 filing season including an update on call volume, error rates and fraud statistics. This session will also cover changes to the Personal Income Tax and Property Transfer Tax returns, as well as changes to the Meals and Rooms Tax return to accommodate the Short-Term Rental charges.

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**1:40-2:00 Business Income Tax** (20 minutes, .4 CPE)

**Presenter:** John Demeter, Assistant Director of Taxpayer Services

**Level:** Overview

**Prerequisite:** None

**Learning Objective:** Learn about some important changes, including forms, pertaining to Business Income Tax

**Summary:** John will walk attendees through changes pertaining to Business Income Tax, including changes to the Form BI-477

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**2:00-2:40 What Preparers Need to Know for the 2025 Filing Season** (40 minutes, .8 CPE Credit)

**Presenters:** Sharon Asay, Director of Finance

**Level:** Overview

**Prerequisite:** None

**Learning Objective:** Learn about new Vermont tax forms and other topics that are highly relevant to the work of tax professionals.

**Summary:** Sharon will provide attendees with information pertaining to form changes, updates on the Department's new scanning system and new e-filing requirements, a review of the current Local Option Tax towns, and other things tax professionals should know as they prepare for the 2025 filing season.

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**2:40-2:55 Break**

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**2:55-3:55 Panel Discussion, a Deeper Dive into 2024 Legislative Changes (60 minutes, 1.2 CPE Credit)**

**Presenters:** Will Baker, Assistant Attorney General, Abby Shepard, Executive Policy Advisor, Jill Remick, Director of Property Valuation and Review, Jake Feldman, Senior Fiscal Analyst, Paul Brodowski, Taxpayer Services Section Chief  
**Moderated by** Rebecca Sameroff, Deputy Commissioner

**Level:** Overview

**Prerequisite:** None

**Learning Objective:** A deeper dive into the tax policy that came out of the 2024 legislative session, and responses to attendee questions.

**Summary:** This panel discussion with some of the Department's subject matter experts will include a deep dive into topics such as changes to the property transfer tax, the 3% surcharge on short-term rentals, repeal of the Sales Tax exemption on prewritten software accessed remotely, changes pertaining to life estates, property valuation and taxing communications property, changes to how property taxes and the property tax credit are calculated, and other topics as time allows.

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**3:55-4:00 Closing Remarks**

**Presenter:** Deborah Carroll, Principal Assistant

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**Continuing Professional Education (CPE) Credits**

**Program Level:** Overview, Basic

**Delivery Method:** Group Live

For National Association of State Boards of Accountancy (NASBA) accreditation purposes, this seminar is in the tax field of study and there are no fees, prerequisites, or advance preparation required for this program.

The learning objectives of this program are to provide timely and relevant tax information for tax professionals and others who may be interested in these topics.

The Vermont Department of Taxes 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 ([nasbaregistry.org](https://www.nasbaregistry.org))

