

MORNING SESSION

- Check-in and Continental Breakfast (Event Center)** 9:00-10:00
- Welcome and Opening Remarks (Event Center)** 10:00-10:15
Department of Finance First Deputy Commissioner Jeffrey Shear
- Option A: Challenging DOF Property Valuations: Tax Commission Appeals and Proposed DOF Rule on Clerical Errors (Event Center)** 10:15-11:00
This panel will address the various ways that property owners in New York City can challenge their annual assessments, including the ways they can meet with DOF representatives at outreach events. Neil Schaier, director of the Office of Administrative Tax Appeals, will describe the process of challenging property valuation appeals at the NYC Tax Commission.
(1 CLE credit)
- Option B: Property Tax Exemptions and Co-op/Condo Abatement Updates (Auditorium)** 10:15-11:00
The Department of Finance administers tax exemptions and abatements for properties in New York City. This panel will provide tips for practitioners, real estate professionals, and managing agents on filing and qualifying for benefits.
- Commissioner's Remarks (Event Center)** 11:15-12:00
Department of Finance Commissioner Preston Niblack

AFTERNOON SESSION

- Check-in and Light Refreshments (Event Center)** 12:00-1:00
- Opening Remarks (Event Center)** 1:00-1:15
Department of Finance First Deputy Commissioner Jeffrey Shear
- Option A: New York City Business Tax Updates and the Audit Process (Auditorium)** 1:30-2:20
This panel will cover the ongoing progress of business corporation tax regulations. It will also provide an overview of the audit process and guidance on how to efficiently manage an audit and review of significant unincorporated business tax-related issues. We will discuss common questions about alternative allocation methods and the use of the commissioner's discretionary authority.
(1 CLE credit)
- Option B: Payments, Billing, and Refunds (Event Center)** 1:30-2:20
The Payments, Billing, and Refunds Division is responsible for posting returns and payments, billing, and distributing refunds. This division is the starting point for tax liabilities and balances. We will give an overview of how e-Services helps you to manage your business with the Department of Finance. We will include tips on navigating e-Services, information on available tax credits, and guidelines for filing.
(1 CLE credit)
- Option A: How DOF Is Enhancing Customer Service (Auditorium)** 2:30-3:20
Join the Customer Operations Division to discuss initiatives that improve DOF's customer service. Meet Linda the chatbot, our 24/7 virtual assistant. We'll showcase the bot's ability to provide answers to customer questions about parking and property tax payment plans, business and excise taxes, and ECB judgment debt.
- Option B: Taxpayer Advocate Problem Solving (Event Center)** 2:30-3:20
Join the IRS Local Taxpayer Advocates, NYS Office of the Taxpayer Rights Advocate, and the NYC Taxpayer Advocate for important updates to help you and your clients. Learn more about how our offices can help you resolve your cases and questions.
(1 CLE credit)
- Closing Remarks (Event Center)** 3:30

