PENNSYLVANIA SOCIETY OF TAX & ACCOUNTING PROFESSIONALS
LEVERAGE THE POWER OF SMALLER PRACTICES℠

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PHILADELPHIA TRI-COUNTY & SOUTHEAST CHAPTERS

PA: PX-000501L , NJ: 20CE00159200, NY: 002280, IRS: E3S5R

Ethics: Engaging & Terminating Clients and S Corporation Exit Strategies

Tuesday, June 23, 2026

DiFabio's Spring Valley House
400 West Woodland Ave
Springfield, PA 19064
Phone: 484-444-0850

Registration: 7: 30 AM
CPE: 8 AM—12 PM

Buffet lunch will be served following the meeting

CPE Credits: 2 Hours Federal Ethics & 2 Hours Federal Tax

Speaker: James F. Tice, EA

Name:_____ **PTIN #**_____

Street Address: _____**City/State/Zip**_____

Email Address:_____ **Phone**: (____)_____

□ **PSTAP Member Early Bird** ***(register on or before 6/9/26)*****: $109** □ **PSTAP Member Regular Rate: $119**

□ **Non-Member: $139**

Will you be joining us for lunch? Yes ___ No ___

Amount Enclosed: _____

□ Check made payable to: Philadelphia Tri-County Chapter is enclosed**.****

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Register Online: www.pstap.org
Mail form with payment to: PSTAP Executive Office, Attn: Philadelphia Tri-County Chapter
150 Corporate Center Dr., Ste. 205, Camp Hill, PA 17011
FAX: 717-614-8663 Questions? 1-800-270-3352

If you would like accessibility accommodations or require any specific assistance at the venue, please indicate how we can best serve you:

_____

_____

No show ineligible for refunds. Cancellation policy: pstap.org/event-policy Topics are Subject to Change. **PH Ethics/S Corp 06.23.26**

Course Descriptions:

Ethics: Engaging & Terminating Clients - Navigating client relationships with ethical integrity is crucial for tax professionals. This course examines the ethical considerations involved in engaging, maintaining, and terminating client relationships, highlighting best practices for fostering productive interactions. Participants will explore effective strategies for attracting new clients, conducting meaningful conversations, and ensuring transparency through engagement and termination letters. This session provides both a practical framework and real-world scenarios to help professionals manage client interactions with confidence.

S Corporation Exit Strategies - S corporations are often closely held businesses, built and sustained by a select group of shareholders. While their single-level tax structure provides operations advantages, it also presents unique opportunities for tax-efficient business exits. This course explores the tax implications of various exit strategies, including stock and asset sales, 338(h)(10) transactions, stock redemptions, tax-free reorganizations, and initial public offerings (IPOs). Participants will gain valuable insights into structuring transactions to maximize benefits while ensuring compliance with federal tax regulations.

Speaker Bio: James F. Tice, EA is a distinguished leader in the firm's tax practice. He specializes in organizing, preparing, and supervising complex tax planning and compliance for various tax-exempt organizations and small businesses. Mr. Tice frequently lectures on a wide range of topics, including tax, business, and ethics. He has been actively involved with the Pennsylvania Society of Tax & Accounting Professionals since 2005 and has been enrolled to practice before the IRS since 2012.

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