2019 Indiana State Tax Update
Indianapolis, IN - Thursday, September 26, 2019

You'll be able to:

Learn from Judge Martha Wentworth what's new at the Indiana tax court and review national tax news.

Review state and local tax incentive tools and approval processes.

Study real property and personal property tax issues and updates.

Discuss Indiana sales and use tax and industry-specific issues.

Review Indiana Department of Revenue policy and get legal, appeals, general and audit updates.

Examine recent Indiana income tax determinations, legal updates and administrative guidance.

Indiana Department of Revenue Update
General and audit update
Legal and appeals update
Policy and legislative update
Laura L. Rakaska
Lena N. Snethen
Christopher Russell

Indiana Property Taxes
Real property tax issues and updates
Personal property assessments and reporting issues
Personal property issues and updates
Contract audits – tips and procedures
Kevin D. Chestnut

Indiana Income Tax Highlights
Latest income tax legislation
Review of recent income tax cases
Updated administrative guidance
Important Department of Revenue determinations
Nathan J. Hagerman

2019 Indiana Tax Court Update
History and purpose of the tax court
What's new at the tax court?
National SALT issues
Tax in the news
Tips for persuasive advocacy
Hon. Martha B. Wentworth

Indiana Sales and Use Tax
Sales tax imposition
Use tax imposition
Industry specific issues
- Manufacturing - Retail
- Transportation - Healthcare
- Hospitality - Services
- Not-for-profits
Recent developments
Cases
Administrative determinations
Jeff Greene

Indiana Department of Revenue Update
Laura L. Rakaska
Lena N. Snethen
Christopher Russell

Indiana Property Taxes
Kevin D. Chestnut

Indiana Income Tax Highlights
Nathan J. Hagerman

2019 Indiana Tax Court Update
Hon. Martha B. Wentworth

Indiana Sales and Use Tax
Jeff Greene

Learning Objectives

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Continuing Education Credits

Accountants
8.0 CPE Hours

Indiana Attorneys
6.7 CLE Hours

Certified Financial Planners
7.0 CE Hours
Laura L. Bakaska is the executive director of Audit and Compliance Support at Indiana Department of Revenue. She directs the team that oversees the state’s audit and compliance programs, including audit project management, compliance efforts as well as the audit department. She oversees the Division’s fraud, analytic and special audit support operations. Prior to coming to the department, Ms. Bakaska was involved in public accounting for 10 years, primarily in the area of audit and advisory services. She holds a bachelor’s degree in Accounting from Ball State University and is an active CPA.

Lena N. Snethen is deputy general counsel at the Indiana Department of State Revenue where she oversees the Appeals Section. The Appeals Section is charged with addressing individual and business challenges to assessments, audit results, information requests, and the Department’s interpretation of Indiana’s state tax laws. During the 1990s, she worked in higher education fundraising where she helped a team at DePauw University successfully raise over $50 million in annual gifts. Ms. Snethen attended the Maurer School of Law at Indiana University, graduating in 2005. After stints in estate planning and civil liberties work, she joined the Department’s Legal Division in 2007 as senior hearing officer. In 2015, after a year litigating tax cases as an Indiana deputy attorney general, she returned to the department to lead the Appeals Section as assistant general counsel.

Christopher Russell joined the Indiana Department of Revenue (DOR) in January 2017 as special counsel and policy director. Mr. Russell oversees the department’s legislative and guidance initiative, as well as special legal initiatives designed to further enhance DOR’s commitment to simplification, accuracy and reliability of tax services, and he serves as liaison to the Indiana Office of Management & Budget. Mr. Russell was previously deputy general counsel under then general counsel Knopp at the Indiana Bureau of Motor Vehicles (BMV). He earned his J.D. degree from the Indiana University Robert H. McKinney School of Law.

Kovin D. Chestnut is the president of Chestnut Property Tax Services, LLC. Formerly, he served as a director and practice leader for the Indianapolis office of RSM, Thomson Reuters, and Deloitte. He has been involved with real and personal business property tax for more than 30 years. Mr. Chestnut has extensive experience with property tax reduction and administrative appeal representation, assisting clients with strategic tax planning, compliance work including the preparation of all business personal property forms, applications, audit representation, and testimony. Mr. Chestnut started his career as a field auditor and then, director with the Assessment Division of the Indiana State Board of Tax Commissioners. He received a B.S. degree in Accounting from Indiana Wesleyan University. Mr. Chestnut is an active member of the tax committee for both the Indiana Manufacturer’s Association and the Indiana Chamber of Commerce.

Christopher N. Hagerman is a multistate tax attorney at KSM Location Advisors. Part of the Katz, Sapper & Miller LLP Location Advisors group, KSM Location Advisors works closely with companies across the country to maximize state and local incentive packages and make fully informed, data-driven location decisions. In his role, Mr. Hagerman assists in the execution of projects, working with clients and economic development officials for both incentive and location advisory assignments. Prior to joining the firm, he worked at Cushman & Wakefield, most recently as manager, where he supported the advancement of their national brokerage practice groups. Mr. Hagerman received a bachelor of arts degree in Journalism from Indiana University and a master of business administration from Indiana University – Kelley School of Business.

Jeff Greene currently practices law in his own firm, Jeff Greene Transaction Tax Attorney. After graduating from Indiana University School of Law, he started his career in state and local tax as a sales tax hearing officer with the Indiana Department of Revenue. In 2004, he joined a small consulting firm as its vice president and general counsel, started the state and local tax practice at Deloitte’s Indianapolis office, and in 2007, he joined Grant Thornton as a national product leader for Grant Thornton’s automation practice. Before starting his own practice, he was the national practice leader for Crown Horwath’s sales and use tax practice. Mr. Greene is an active in the Institute for Professionals in Taxation (IPT). He has been a certified member of IPT since 1995 and serves on the certification committee which administers the IPT certification process. Mr. Greene is a frequent speaker on multistate sales and use tax issues and sales tax process improvement.

Alexis M. Sowder is a multi-state project manager at KSM Location Advisors. Part of the Katz, Sapper & Miller LLP Location Advisors group, KSM Location Advisors works closely with companies across the country to maximize state and local incentive packages and make fully informed, data-driven location decisions. In his role, Mr. Hagerman assists in the execution of projects, working with clients and economic development officials for both incentive and location advisory assignments. Prior to joining the firm, he worked at Cushman & Wakefield, most recently as manager, where he supported the advancement of their national brokerage practice groups. Mr. Hagerman received a bachelor of arts degree in Journalism from Indiana University and a master of business administration from Indiana University – Kelley School of Business.

Laura L. Rakaska is the director of Audit and Compliance Support at Indiana Department of Revenue. She is the team leader of the tax audit and compliance services team, which oversees the division’s fraud, analytic and special audit support operations. Prior to coming to the department, Ms. Rakaska was involved in public accounting for 10 years, primarily in the area of audit and advisory services. She holds a bachelor’s degree in Accounting from Franklin College and is an active CPA.

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