

***Tax Exempt? Not So Fast!***

*The New TJCA has created many new rules for schools to follow in order to stay in compliance with regulators and to maintain their tax-exempt status. This session will dive into the provisions directly impacting private schools and how they can affect policy decisions and public reporting.*

**Learning Objectives:**

Participants will review the direct and indirect impact of the TCJA on private schools; learn from examples how to keep their school in compliance; evaluate reporting challenges for schools in 2020; and identify best practices to maintain compliance.

**Presenter: Matthew Petroski, Director, Nonprofit Tax, Armanino LLP**

Matt Petroski is a nonprofit tax specialist with 18 years of experience in the industry. He recently joined Armanino after spending his career in PwC's National Tax Services Exempt Organization Tax Services Practice. He has experience working with exempt organizations in a variety of capacities, including consulting on formation, board governance, other tax consulting, and as an outside service provider of comprehensive tax compliance services.

Matt received his BS in finance from the University of Maryland at College Park where he was enrolled in the University Honors Program. He also received his JD/MBA and LLM in Taxation from Villanova University. Matt is a licensed member of the Pennsylvania and New Jersey bars and is a member of the ABA Tax Section.

**Field of Study:** Taxes

**Prerequisites:** Basic knowledge of independent school finances

**Advanced Preparation:** None

**Program Level:** Update

**Delivery Method:** Group Live

**Participants will earn 1 CPE credit.**