

OZ 201: Overcoming obstacles

Learning objectives:

- Identify challenges in planning, financing, and compliance in OZs
- Identify best practices for addressing challenges in OZs
- Identify best practices for managing and deploying debt and equity proceeds within the structure, including timing and incentive compliance concepts.
- Identify implemented and proposed amendments to the regulations as a response to COVID-19

Instructions delivery method: Group live

Program level: Intermediate

Prerequisites: A basic understanding of the OZ incentive

Advance preparation required: None

Recommended field of study: Taxes

Recommended CPE credits: 4

NASBA Registration

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Attendance Policy

In accordance with the standards of the National Registry of CPE Sponsors, CPE credits for this course are based on a 50-minute hour group-Internet based instructional method and responses to three attendance monitoring activities (usually in the form of polling questions) per credit. Failure to participate in the entire live webinar will result in partial or no CPE credit.

Registration Cancellation Policy

All cancellations must be made in writing and must be received no later than three (3) days before an event. A \$100 administrative fee will be deducted from all refunds per attendee. We **regret that we cannot refund cancellations made within 3 business days of the workshop or to registrants who do not attend the workshop**. Confirmed registrants who fail to attend and do not cancel will be charged the entire registration fee.

Concerns Policy

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Course Delivery Policy

Delivery Method: Group Internet

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