

Sponsored Events | March 9, 2023

NABL U: The Institute

SPEAKERS

[Todd L. Cooper](#) | [Drew Slone](#)

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Todd Cooper and Drew Slone will serve as Panel Chairs at NABL U: The Institute on March 9-10, 2023. Todd will discuss 'Tax Rules that Only Apply to Small Issues' on March 10 at 10:30am MT, and Drew will cover 'Two Thousand Twenty-Three Leagues Under the Diligence Sea: A Deeper Dive into Due Diligence' on March 9 at 2:45pm MT.

This year's Institute will delve into the most recent trends, best practices, and challenges affecting the municipal finance practice. It is the only conference of its kind that provides sessions featuring advanced topics designed to appeal to experienced professionals. The conference expands on subjects addressed in The Essentials and Workshop conferences, as well as general knowledge sessions. The topics covered at The Institute will help you develop your practice and keep you informed about industry developments.

Tax Rules that Only Apply to Small Issues

Several federal income tax exceptions or special rules apply only to bonds issued under a certain dollar amount, and this panel will focus on those, including bank-qualified status, small issue industrial development bonds for manufacturing, small issue rebate exceptions, and other tax guidance specific to smaller transactions.

Two Thousand Twenty-Three Leagues Under the Diligence Sea: A Deeper Dive into Due Diligence

On the heels of NABL's 2022 White Paper on this topic, this panel will consider strategies for determining what to review when conducting due diligence on certain types of transactions, considerations when diligencing third party reports and confidential information, and best practices in the diligence process.

[Click here for more information on the conference.](#)

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