

Tax Institute 2013

The Internal Revenue Service and the Delaware Division of Revenue are proud to sponsor the 37th Annual Federal and State Tax Institutes. The Institutes consist of presentations for tax-return preparers and practitioners and are offered at three Delaware locations during December 2013.

The Internal Revenue Service and the Delaware Division of Revenue are jointly sponsoring the Institutes. The goal of the institutes is to update, clarify, and explain federal and state tax law reporting requirements and any new tax law developments.

EARN UP TO 8 CPE CREDITS



SCHEDULED TOPICS:

- ❖ Delaware Personal and Business Tax Updates
- ❖ Maryland Tax Updates
- ❖ 2013 Business and Individual Tax Updates
- ❖ Individual Mandate Provisions of the Affordable Care Act
- ❖ Income, Estate & Gift Tax Impact of the Supreme Court's Windsor Decision
- ❖ Tax Considerations When Dealing with a Chronically Ill Family Member
- ❖ IRS Updates
- ❖ The Neighborhood Assistance Act
- ❖ Taxpayer Advocate Service
Your Voice at the IRS

MATERIALS & LAPTOP USAGE:

Tax Institute materials will not be provided in book format this year. Instead, attendees will receive a paper notepad and a CD containing the speakers' presentations and notes.

Laptops will not be provided but please feel free to bring your own if you wish to view the CD during the Tax Institute.

Division of Revenue is not responsible for lost or damaged laptops or for supplying batteries, charging stations or extension cords.

CERTIFICATES:

All certificates will be emailed within 2-3 weeks after the Tax Institute. Please make sure we have your current email address if you wish to receive your certificate in a timely manner.

CPAs — CPE CREDITS:

Complete attendance during each session is required to earn the associated credit. No half or partial credits will be given.

- ❖ CPAs can earn a maximum of eight (8) credits.

CERTIFICATE OF ATTENDANCE:

Complete attendance during each session is required to earn the associated attendance hour. No half or partial hours will be given.

- ❖ Non CPAs can earn a maximum of (8) hours of attendance.

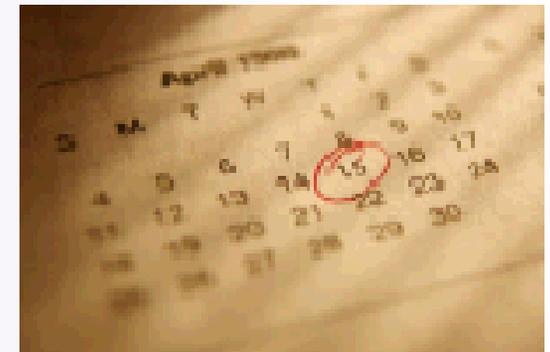
EAs — CE CREDITS:

The State of Delaware is currently not a Certified CE Provider. However we are attempting to qualify for 5 IRS CE credits. Otherwise NO CE credits will be issued this year.

Note: CPAs, Attorneys, and others licensed by state boards/organizations should check with their respective boards/organizations to determine if these credits/hours apply toward their continuing education requirements.



WELCOME TO THE 37th ANNUAL FEDERAL AND STATE TAX INSTITUTES



**Sponsored by the Internal Revenue Service
and the Delaware Division of Revenue**



Delaware Division of Revenue

Tax Institute 2013

DIRECTIONS:

University of Delaware - New Castle County Clayton Hall

Take I-95 to exit 1B, Merge onto Route 896 North (S. College Ave) towards Newark, at the dead end turn left onto Main St., continue following 896 by making a right onto New London Rd. and then a right onto Pencader Way.

Dover Downs - Kent County www.doverdowns.com

Conference Center is located on the Northbound side of Route 13, at Dover Downs Raceway.

Rehoboth Beach - Sussex County Convention Center

From DE-1 take Rehoboth Ave/DE-1 Alt E. Make a left onto 2nd Street, then a left onto Rehoboth Ave. The convention center is located at 229 Rehoboth Avenue.

SPEAKERS:

Internal Revenue Service

Narina Bchtikian, Sr. Stakeholder Liaison
Steve Connor, Stakeholder Liaison
Wayne Garvin, Delaware Taxpayer Advocate

Belfint, Lyons & Shuman, P.A.

Jordon Rosen, CPA, Director
Kathryn S. Schultz, CPA, Principal

Delaware

Patrick Carter, Director of Revenue
James Stewart, Asst. Director, Personal Income Tax
Michael Smith, Asst. Director, Office of Business Tax
Cynthia Deakyne, Housing Asset Manager, DSHA

Maryland

Wallace Eddleman, Deputy Director,
Revenue Administration Division
Chris Kolb, Manager - Taxpayer Media and Education

FEE: \$40.00

The registration fee for the Tax Institute is \$40.00 and includes materials, continental breakfast, and a certificate of completion. Registration and check-in start at 7:30 a.m. The Institute begins **promptly** at 8:00 a.m. and ends at 4:30 p.m.

LUNCH:

A Sandwich and Salad Buffet will be available for an additional \$23.00 at the Clayton Hall, New Castle location only.

REGISTRATION:

Complete the attached form and register using one of the following payment options: Check or Money Order. Payment should be payable to the **Delaware Division of Revenue** and mailed to the address on the form.

Mail-in registrations **must** be received by Nov. 22, 2013 prior to the Institute. Late registrations will be accepted on a space-available basis.

CHANGES:

You may change your registration from one location to another only when space is available. Only one change per registration is allowed. To change your registration, submit a written request at least five working days before the earlier of the three Tax Institute dates.

WITHDRAWALS AND REFUNDS:

Withdrawal and refund requests must be submitted in writing. If written notice is received at least five working days before the Tax Institute for which you are registered, the registration fee, will be refunded. No refund will be made after that time. Stopping payment on checks for registration does not constitute an official withdrawal, and there is a \$30 charge for dishonored checks.

CANCELLATION:

We reserve the right to amend or cancel the Tax Institute. In the event of cancellation, you will receive a full refund.

Registration Form

PLEASE REGISTER ONLY ONE PERSON PER FORM. Photocopy this form as necessary. Payment must accompany this form. For more information, please call (302) 577-8688.

Please indicate the date and location of the Tax Institute you prefer. Registration Fee is \$40.00.

- Mon., December 2, 2013 - Convention Center, Sussex
 Tues., December 3, 2013 - Dover Downs, Kent
 Wed., December 4, 2013 - Clayton Hall, New Castle
 Check Here To Purchase Lunch (\$23.00) New Castle Only

Name (Attendee)

Mailing Address

Telephone

E-Mail Address

PTIN#

Please check one of the following:

- CPA Enrolled Agent
 Other _____

METHOD OF PAYMENT

Check or Money Order

PAYABLE TO: Delaware Division of Revenue
820 N. French Street
Wilmington, DE 19801
Attn: Carol P. Thomas