

Tax Institute 2014

The Internal Revenue Service and the Delaware Division of Revenue are proud to sponsor the 38th 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 2014.

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 Tax Updates
- ❖ Delaware Business Tax Updates
- ❖ Maryland Tax Updates
- ❖ 2014 Business and Individual Tax Updates
- ❖ Taxpayer Advocate Service
- ❖ IRS Updates
- ❖ New Jersey Tax Updates
- ❖ PA Tax Updates (only at Clayton Hall location)

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.

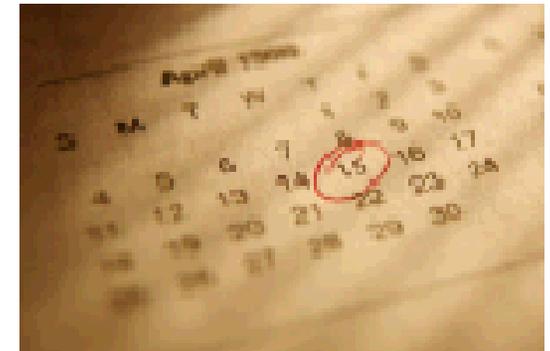
EA & AFSP Participants - CE CREDITS:

The State of Delaware is currently not a Certified CE Provider. **NO CE credits will be issued this year.** EA and AFSP Participants will be issued a Certificate of Attendance.

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 38th ANNUAL FEDERAL AND STATE TAX INSTITUTES



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



Delaware Division of Revenue

Tax Institute 2014

DIRECTIONS:

University of Delaware - New Castle County Clayton Hall

Take I-95 to exit 1B, Merge onto Rt 896 North (S. College Ave) towards Newark, turn left at dead end (Main St.), continue on Rt 896 making a right onto New London Rd, 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 St, then a left onto Rehoboth Ave The convention center is located at 229 Rehoboth Ave.

SPEAKERS:

Internal Revenue Service

Narina Bchtikian, Sr. Stakeholder Liaison
Steve Connor, Stakeholder Liaison
Wayne Garvin, Delaware Taxpayer Advocate
Chris Neighbor, Taxpayer Advocate Service Area 2

Belfint, Lyons & Shuman, P.A.

Kathryn S. Schultz, CPA, Director
Stephanie L. Chapman, CPA, Tax Manager

Delaware

Patrick Carter, Director of Revenue
James Stewart, Asst. Director, Personal Income Tax
Michael Smith, Asst. Director, Office of Business Tax

Maryland (All three locations)

Wallace Eddleman, Deputy Director, RAD
Steven Gaul, Manager Tax Forms Unit, RAD
Sarah Dufresne, Manager Legal Section RAD

New Jersey (All three locations)

Alexis DeRosa, Taxpayer Service Representative
Tax Training & Outreach

Pennsylvania (Clayton Hall Only)

Donald Bianchi, Assistant to the Director for the Bureau of Individual Taxes

FEE: \$45.00

The registration fee for the Tax Institute is \$45.00 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 \$24.00 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 listed on the form. Registrations **must** be received by November 24, 2014 prior to the Institute. Late registrations will be accepted on a space-available basis.

NJ & PA TAX UPDATES:

New Jersey Representatives **will be** presenting Tax Updates at all three locations this year.

Pennsylvania Representative **will only be** presenting Tax Updates at the Clayton Hall location.

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.

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 \$45.00.

- Mon., December 8, 2014 - Dover Downs, Kent
 Wed., December 10, 2014 - Convention Center, Sussex
 Thurs., December 11, 2014 - Clayton Hall, New Castle
 Check Here To Purchase Lunch (\$24.00) New Castle Only

Name (Attendee)

Mailing Address

Telephone

E-Mail Address (Required to receive certificate)

PTIN#

Please check one of the following:

- CPA Enrolled Agent
 Annual Filing Season Program Participant (AFSP)
 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