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Agricultural and Resource Economics
1376 Storrs Road, Unit 4021
Storrs, CT 06269-4021

University of Connecticut

Department of Agricultural
and
Resource Economics

The 2013 University of Connecticut Income Tax School for Practitioners

*A two-day school for
"people who do taxes for other people"*
Tax Practitioners
Tax Consultants
Tax Accountants



APPROVED
CONTINUING EDUCATION
PROVIDER

November 19-20 2013

Cromwell, CT

Sponsored by the
University of Connecticut, Storrs
In cooperation with the
Internal Revenue Service
and the
Connecticut Department of Revenue Services
An Equal Opportunity Employer and Program Provider

The 2013 University of Connecticut Income Tax School

The University of Connecticut Income Tax School is a two-day program on federal and state taxes. It is designed to bring you up to date with the latest tax law information as you prepare for the upcoming tax preparation season. The program is specifically designed for accountants, consultants, attorneys, enrolled agents and all other tax professionals who prepare taxes.

Each registrant receives all three volumes of the 2013 *Federal Tax Workbook*. The volumes include chapters on IRS, ethics, and Affordable Care Act updates; financial distress; new legislation; small business issues; partnership taxation; advanced individual issues (including AMT and gift tax); recent rulings and cases; estimated taxes; and special taxpayers.

The 2013 Income Tax School will have an outstanding group of instructors from the Internal Revenue Service, the Connecticut Department of Revenue Services, and private legal and accounting practices. Each instructor has expertise in important federal or state taxation issues as well as teaching experience.

New this Year!

Enrolled Agents and Other Tax Return Preparers attending this year's program will receive three credits of "federal tax law update" topics, six credits of "federal tax law related" topics, AND two credits of "ethics". Also, starting this year, Certified Financial Planners (CFPs) will receive 15 credits that can be counted towards the CFP Board's continuing education requirements. UConn's CE provider number and relevant program numbers will be made available to the participants during the tax school in November 2013.

UConn tax school participants seeking credits to fulfill any continuing education requirements applicable to all the other categories of tax professionals (for example, CPAs) will be awarded 15 hours of Continuing Professional Education credits and will receive a University of Connecticut certificate of completion.

Cost and Registration

The registration fee is \$325 with an early registration fee of \$300 for those whose registration is postmarked on or before October 16. Early registration is advised as registration is on a first-come, first served basis.

The fee includes continental breakfast, lunch, break refreshments, the tax manual, and other course materials for both days.

Registration fees will be refunded if they are received after the enrollment limit has been reached. Your registration fee will be returned in full if a written cancellation request is received by October 31; from November 1 - November 8 a cancellation fee of \$95.00 will be charged. No refunds will be given after November 9 for cancellations.

School Location

The school will be at the Crowne Plaza, Hartford-Cromwell, 100 Berlin Rd., Route 372, Cromwell CT, with easy access of I-91 (Exit 21 off I-91 South and I-91 North).

Hotel Lodging

Special discount rates are available to school registrants for overnight lodging at the Crowne Plaza, Hartford-Cromwell. Room rates are \$104.00 plus tax for single or double occupancy. To obtain the discount room rate, mention that you are attending the "University of Connecticut Income Tax School" and ask for the discount rate when you make the reservation. Reservations must be made by Nov. 1, 2013 to receive the discount rate. Phone 860-635-2000 for reservations.

Early Registration is Suggested

Since enrollment is limited, registration cannot be accepted after the limit is reached and will be returned with a full refund. For more information, contact tax school coordinator Deepak Joglekar/ Claire Bazzano, University of Connecticut at 860-486-1920 (phone), 860-486-1932 (fax) or claire.bazzano@uconn.edu (e-mail).

Program

Tuesday, November 19, 2013

8:00 - 8:30 Registration and Continental Breakfast

8:30 - 8:35

•Welcome and Introductory Remarks

Deepak Joglekar, Tax School Coordinator

University of Connecticut

8:35 - 10:05

•What's New in Federal Income Taxes?

Eric L. Green, Attorney

Convicer, Percy & Green, LLP

10:05 - 10:20 Break

10:20 - Noon

•Circular 230: How to avoid violating the IRS ethics rules—case studies and practical advice

Diana Leyden

Director and Clinical Professor of Law
UConn Law School Tax Clinic

Noon - 1:00 Lunch at Hotel

1:00 - 2:05

•IRS Key Messages

Joseph McCarthy, CPA

Senior Stakeholder Liaison
Internal Revenue Service

2:05 - 3:10

•IRS Examination Update

Matthew Irving

Examination Group Manager
Small Business / Self-employed Division
Internal Revenue Service

3:10 - 3:25 Break

3:25 - 4:30

•IRS Criminal Investigation Update

Scott Reynolds

Supervisory Special Agent
Criminal Investigation Division
Internal Revenue Service

4:30 p.m. End of First Day's Program

Wednesday, November 20, 2013

8:00 - 8:30 Sign-in and Continental Breakfast

8:30 - 10:00

•Administration, Corporation Tax, Business Entity Tax and Composite Tax Update

Norman Girard, Revenue Examiner

CT Department of Revenue Services

10:00 - 10:15 Break

10:15 - 11:00

•Income Tax, Sales Tax and Use Tax Updates

Jerry Zayas, Revenue Examiner

11:00 - Noon

•A Practitioner's Perspective on CT Taxes

Felicia S. Hoeniger, Attorney

Scott Sebastian, Attorney
Robinson & Cole LLP

Noon-1:00 Lunch at Hotel

1:00 - 2:05

•Employee benefit update: Affordable Care Act, United States v. Windsor, and related issues

Sharon Freilich, Attorney

George Kasper, Attorney
Pullman & Comley, LLC

2:05 - 3:10

•Federal tax consequences of offshore investments by US taxpayers

Louis Schatz, Attorney

Shipman & Goodwin LLP

3:10 - 3:25 Break

3:25 - 4:30

•“Correspondence exams” and “Preparer penalties: An update”

Raymond J. LaLuna, EA

LaLuna Tax Service

4:30 p.m. End of Program

2013 UConn Tax School Registration Form

Last Name First M.I.

Organization/Firm

Address

City State Zip

PTIN# (only for EAs, RTRPs, RTRP candidates)

Daytime Phone

E-mail address

Number of people attending _____

Registration Fee: \$325.00 per person
(one form per registrant)

(Includes lunches, break refreshments,
continental breakfast and tax manual)

Early Registration Fee, if postmarked by
October 16, 2013: \$300.00

Early Registration is advised. Registrations
cannot be accepted after school capacity
is reached.

Please make check payable to:
University of Connecticut
and mail with registration form to:

Claire Bazzano
University of Connecticut
Agricultural and Resource Economics
1376 Storrs Road, Unit 4021
Storrs, CT 06269-4021

(Detach and Mail)

QUESTIONS? Call (860) 486-1920 or e-mail claire.bazzano@uconn.edu