Earn Up To
30 CREDITS
CPE, CLE, CFP, CE

10th Annual

2012 LONG ISLAND TAX PROFESSIONALS SYMPOSIUM

Long Island's Premier Tax Event

NOVEMBER 14, 15, 16, 2012

CREST HOLLOW COUNTRY CLUB • WOODBURY, NEW YORK

KEYNOTE SPEAKERS

Eliot Spitzer
Political and Economic Commentator, TV and Radio

Dr. Pearl Kamer
Chief Economist of the Long Island Association

Commissioner
Thomas H. Mattox
NYS Dept of Taxation & Finance

Mark Whitacre Ph.D
COO, CSO
Cybrus Systems, Inc.
(Former FBI Informant)

2002-2012

ANNIVERSARY

SYMPOSIUM BENEFITS & FEATURES

- NYS Case Resolution On-Site
- IRS Resolution Meetings
- More than 80 Educational Sessions
- State and Federal Tax Law Updates
- QuickBooks Problems Resolution
- Network with 700 Tax Professionals

TECHNOLOGY DAY FRIDAY

Demonstrations, Exhibits and Meetings with Selected Technology Leaders

www.LITPS.org

IRS APPROVED CONTINUING EDUCATION PROVIDER

SPONSORED BY
The Educational Foundation of the Nassau/Suffolk Chapter of the National Conference of CPA Practitioners
IRS Small Business and Self Employed Division Stakeholder Liaison Field

Welcome

KEYNOTE SPEAKERS

November 14
Eliot Spitzer
Political and Economic Commentator, TV and Radio

Dr. Pearl Kamer
Chief Economist of the Long Island Association

November 15
Thomas Mattox
Commissioner, NYS Department of Taxation and Finance

November 16
Mark Whitacre, Ph.D.
COO Cyprus Systems, Inc. (Former FBI Informant)

SYMPOSIUM BENEFITS

- NYS Case Resolution on-site in addition to IRS Resolution Meetings
- More than 80 Sessions
- State and Federal Tax Law Updates
- Connect with Key Suppliers
- QuickBooks Problems Resolution
- Network with 700 Tax Professionals
- MP3 CDs of Available Sessions
- Exhibit Floor Cocktail Parties, Wednesday and Thursday
- Pre-loaded Flash Drive of Available Courses

FRIDAY IS TECHNOLOGY DAY

Demonstrations, Exhibits and Meetings with Selected Technology Leaders

Multiple Attendee discounts are available for NCCPAP Members

2002-2012 ANNIVERSARY

Welcome to the 10th Annual Long Island Tax Professionals Symposium. The Educational Foundation of the National Conference of CPA Practitioners - Nassau/Suffolk Chapter (NCCPAP) along with its co-sponsors invites all CPAs and tax practitioners to take advantage of the opportunity to earn up to 30 Continuing Professional Education Credits (CPEs).

Last year, the symposium once again proved to be a premier event with over 650 attendees per day! The response was overwhelmingly positive as professionals had the opportunity to exchange ideas and concerns with each other, as well as with the city, state and federal government agencies that administer tax systems.

This year's Long Island Tax Professionals Symposium will continue to bring to its attendees a full three days of informative, up-to-date programs presented by top professionals in their field. Programs include a CFP track for your financial planning needs, A & A sessions, and of course, a multitude of tax courses covering every aspect needed.

The Lunch Session programs have received tremendous acclaim. This year we have expanded these to include even more topics, speakers, and panels where you can enjoy your lunch while attending the course and earn an extra CPE credit for each!

We have also expanded and enhanced our Technology Day on the third day. We are expanding our exhibitors, as our registrants gained tremendous insight and practical experience by spending time with these vendors from all aspects of the technology needed in our practices.

This year we have expanded to various other local chapters of our national organization, so that we can share many of our programs via webcast. We know this will continue to be a valuable resource.

Key IRS and NY State executives will present many of the sessions and specialists will be on hand to answer technical questions. The IRS Case Resolution Room will provide an opportunity to resolve your client issues through IRS' Everyday Tax Solutions assistance and Taxpayer Advocate Service. Additionally, we are fortunate to have New York State representatives who will work to resolve NYS cases in their own Case Resolution room.

I would personally like to extend my sincere thanks to the Tax Professionals Symposium Executive Committee chaired by Bob Goldfarb and consisting of Ross Kass, Harold Ogulnick, Karen Giunta, Paula Sheppard, Ruthanne Corazzini, Andrea Parness, Donald Ingram, Kathy Casey, Stephen Sternlieb, Ed Caine, Barry Zalk, Sandra Johnson, Jeff Winer, Robert Barnett and Ken Hauptman. Under their guidance this premier, magnificent event has continued to expand and make us truly proud.

Gary

GARY SANDERS, CPA
President Nassau/Suffolk Chapter National Conference of CPA Practitioners

SHANE FERGUSON, Director
IRS Stakeholder Liaison Field Operations Small Business/ Self-Employed Division

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2012 Long Island Tax Professionals Symposium

Keynote Speakers

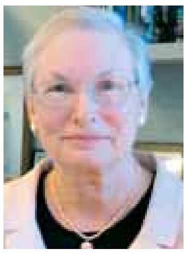
Opening Session — KEYNOTE SPEAKERS — Wednesday, November 14, 8:00 am

Eliot Spitzer

Eliot Spitzer was born and raised in New York. He graduated from the Horace Mann School, Princeton University, and Harvard Law School, where he was an editor of the Harvard Law Review. After clerking for Federal District Court Judge Robert W. Sweet, Spitzer practiced at Paul, Weiss and then joined the Manhattan District Attorney's Office. While there he rose to serve as chief of the labor racketeering unit and he successfully prosecuted some of the most senior members of the Gambino organized crime family.

After several years in private practice, in 1998 he was elected Attorney General of New York and was re-elected in 2002. His prosecutions in the areas of financial fraud, environmental protection and civil rights set a new standard for law enforcement, and in 2002 *Time Magazine* named him "Crusader of the Year." 60 Minutes dubbed him the "Sheriff of Wall Street," and the *Financial Times* named him "Man of the Year."

He was elected Governor of New York in 2006, and subsequent to his resignation from that position in 2008, he has served as an anchor on CNN's prime time show *In the Arena*, served as a professor at CCNY, written articles bi-weekly for *Slate Magazine*, and participated in running a family business. He has appeared with regularity on the leading TV and radio shows which focus on politics and economics and has lectured at leading universities both in the United States and abroad. At present Spitzer hosts *Viewpoint with Eliot Spitzer* nightly on Current TV and appears weekly on NY 1's *Wise Guys.*



Dr. Pearl M. Kamer

Pearl M. Kamer is Chief Economist of the Long Island Association, Long Island's largest business and civic organization, where she monitors and analyzes national, regional and local business trends. Dr. Kamer received her Ph.D. and M.B.A. degrees from New York University and her undergraduate degree from Queens College where she was elected to Phi Beta Kappa.

Dr. Kamer serves on the Board of Economic Advisors to the Ways and Means Committee of the New York State Assembly. She is Chair of the Farmingdale State College Council. Dr. Kamer also serves on the Board of Directors of the Community Development Corporation of Long Island and the Broadhollow Bioscience Park at Farmingdale State College.

Dr. Kamer has taught at Hofstra, Adelphi, Stony Brook, New York University and Queens College. She is the author of two books: *Crisis in Urban Public Finance* and *The U.S. Economy in Crisis: Adjusting to the New Realities.*

Day Two — KEYNOTE SPEAKER — Thursday, November 15, 8:00 am

Commissioner Thomas H. Mattox

Thomas H. Mattox is Commissioner of the New York State Department of Taxation and Finance.

The Department's core mission is to efficiently collect tax revenues in support of state services while acting with integrity and fairness in the administration of the tax laws of New York State. Balancing efforts to promote voluntary compliance – the cornerstone of the state's system of taxation – with the duty to enforce New York's tax laws is a focal point of the department's management strategy. The Department administers more than 40 state and local taxes and fees which require the annual processing of 24 million tax returns and the collection and accounting of $90 billion in annual state and local revenue; other responsibilities include the state's treasury function. The Department's workforce of 5,400 employees is based in Albany and district offices across the state, and its annual budget is $485 million.

Mr. Mattox previously worked at Goldman Sachs & Co., where he served as a Managing Director and Global Head of Operation Risk Management, and Chief of Staff in the Controllers, and Finance and Resources Divisions.

Before joining Goldman Sachs & Co., Mr. Mattox was Senior Vice President at Chase Manhattan Bank where he led merger integration and business development initiatives in the Management Consulting Center and the Capital Market Fiduciary Services. He also served as a consultant at Monitor Company.

He is a graduate of Harvard University, and holds an M.B.A. from Stanford University.

Day Three — KEYNOTE SPEAKER — Friday, November 16, 8:00 am

Mark Whitacre

Mark Whitacre is an Ivy League Ph.D and is best known for being the highest-ranked executive of a Fortune 500 company to ever become a whistleblower in US history. He was the FBI informant of the historic ADM case and wore a wire every day for almost three years. However, he was charged for a white-collar crime involving fraud that occurred during his tenure as President of the Fortune 500 company's BioProducts Division. Whitacre served over eight and half years in federal prison. His undercover work with the FBI during the ADM scandal was the inspiration for the major motion picture, *The Informant*, starring Matt Damon as Mark Whitacre. The recent Christian book, *Mark Whitacre Against all Odds*, describes the rest of the story about how faith has molded Mark's life since the ADM scandal.

As Douglas Burris, Chief of U.S. Federal Probation in the Eastern District of Missouri has stated publicly, "The story about Mark Whitacre's redemption and second chance is one of the most inspirational stories of our time." Today, the FBI agents, who were involved with Mark's case, tout Whitacre publicly as a "national hero" for his substantial assistance with one of the most important white-collar cases in history. And four FBI agents -along with a former federal prosecutor involved with Mark's case – are lobbying for a Presidential Pardon for Mark.

Mark currently holds the position of Chief Operating Officer (COO) and Chief Science Officer at Fresno biotechnology company, Cypress Systems, Inc. He is also an active part of JPW3 Prison Outreach Ministries.

If you would like to know more about Mark, go to the following link: www.markwhitacre.com

REGISTRATION

The basic fee for the 2012 Long Island Tax Professionals Symposium includes a daily continental breakfast and lunch and **a full set of available courses of the 2012 LI Tax Symposium on MP3 CDs.** Continuing Legal Education (CLE) credits are available for an additional charge of **$25 per credit by** the Nassau Academy of Law. NCCPAP remits the entire fee collected directly to the Nassau Academy of Law.

HOW TO REGISTER

Web: www.LITPS.org • Fax to: 516-997-5155

Add $45 to registration fee if registering by fax or mail

REGISTRATION FEES

Early Registration Prior to November 1

	1 Day	2 Day	3 Day
Members of Sponsoring Organizations	$320	$640	$790*
Non Members	$370	$740	$925

Registration November 1- November 9

	1 Day	2 Day	3 Day
Members of Sponsoring Organizations	$370	$740	$865*
Non Members	$445	$790	$975

At the Door Fees (After November 9)

	1 Day	2 Day	3 Day
Members of Sponsoring Organizations	$435	$795	$1155
Non Members	$485	$870	$1280

All three-day registration passes are transferable among members of company staff, limited to one staff member per day.

*SAVE $100 on Multiple Registrations

Three-day fee reduced by $100 for each staff member registered after first two. Must be members of the same firm and a member of a LITPS sponsoring organization.

CANCELLATION POLICY

Full refunds for registration fees, less a $100 processing fee, will be granted if a written request is received by N/S-NCCPAP office by October 31, 2012. We regret that refunds are not available after that date. However, registrants will receive all appropriate course materials.

Note: Attendee will not receive continuing education credit for any session after attendance in the session has been taken and verified. It is your responsibility to have yourself scanned into every session that you attend.

THE ELECTRONIC AGE... SEMINAR MATERIALS ACCESS

All presentations will be available for downloading at www.litps.org by Monday November 12. We suggest all attendees download their first day seminar course materials prior to arrival at Crest Hollow. This will make it more convenient to work and follow on your laptop and those who prefer paper copies can print the applicable papers at your convenience.

Our goal is to significantly cut down on the overall cost, paper and waste while providing you with efficient access to the materials for the seminars you attend as well as those that might not be on your schedule.

We understand this may inconvenience some attendees and for that, we apologize and hope you understand that our goal during these difficult economic times is to save everyone some money.

We would like to say that our motivation was "Going Green," but have to admit it is simply a side benefit of the economic and technology necessities.

Please remember we will provide you with a preloaded flash drive, compliments of CMIT, containing all of the available course materials at the symposium at no additional cost to you. Just be sure to obtain your coupon for the flash drive when you check in and then redeem the coupon at the CMIT booth in the Exhibit Area!

NOTE: Printing of course materials during the event at Crest Hollow will not be available.

Should you have any questions, concerns or suggestions please call the Symposium Chairperson, Bob Goldfarb, CPA, at 516-364-0100.

ABOUT PHOTOS

We retain the right to publish photos and/or images and/or modified photos and/or images taken/shot at this or prior NCCPAP events in future NCCPAP publications or advertisements or on any NCCPAP website or NCCPAP related public media location/blog without your formal consent or approval.

2012 Long Island Tax Professionals Symposium

THE SEMINARS

IRS representatives, NYS tax representatives, tax professionals and other subject matter experts will present all seminars. Seating is limited. Please register online early to ensure your seat. The Seminar sessions will cover many of the late-breaking tax issues as well as updates for the 2012 filing season, including the mandatory electronic filing in New York State.

Included in the LITPS program are seminars presented by the Financial Planning Association; a leader in establishing educational, professional and ethical standards of practice for almost half a century.

Members are a diverse group of accounting, investment, legal and other professionals who share the goal of providing good people with good advice.

FPA's participation in the Long Island Tax Practitioner Symposium is intended to help you learn more about the issues facing your clients. Instructors are all financial planning professionals and specialists. Volunteers are prepared to answer your questions and help you solve your clients' financial planning needs.

The LITPS is a great networking opportunity where you can connect and establish a strategic relationship with allied professionals.

All speakers are subject to change without notice. ***Please note that seating is extremely limited.*** Don't be left out – register early.

Some speakers are affiliated with an exhibitor or sponsor. NCCPAP, and other sponsoring organizations, do not endorse any product or service.

PROFESSIONAL CREDITS

Attendance at these seminars can qualify for up to 30 Continuing Professional Education (CPE) credits in Tax (as noted in the seminar schedule) issued by the Educational Foundation of N/S-NCCPAP Chapter. In order to receive your professional credit you must attend the courses for which you registered. The Educational Foundation of N/S-NCCPAP is an approved sponsor with the NYS Board of Accountancy. This program is designed to qualify for up to 30 hours of CPE credit for accountants (Sponsor License #000216). NCCPAP is a registered provider of IRS CE Credits. Certain LITPS seminar programs will qualify – for details see www.LITPS.org

Continuing Legal Education (CLE) credits are available from the Nassau Academy of Law. New Jersey licensees may receive New Jersey CPE issued by NCCPAP under Sponsor Number CE0046700. It is the responsibility of the attendee to understand and comply with their state licensing agency's CPE requirements. It is also the responsibility of the attendee to coordinate the reporting of credits earned with their state licensing agency.

NOTE: All sessions may be eligible for other CPE credits. Check with your organization for eligibility.

THE EXHIBITORS

We invite you to attend the exhibit area where key vendors display their products. Many of our exhibitors are sponsoring special events this year. Please explore the exhibit area and take advantage of the opportunity to assess their products. Don't forget your business cards for the exhibitor raffles.

IRS CASE RESOLUTION

As part of the IRS' continuing effort to provide top quality service to taxpayers and their representatives, the Symposium will include a "Practitioner Case Resolution" Program. This program will provide an opportunity to work directly with IRS representatives from Automated Collection Systems (ACS), Practitioner Priority Service (PPS) Automated Underreporting Program (AUR) and Taxpayer Advocate Service (TAS) on unassigned tax account issues. Please note ID Theft cases and issues cannot be addressed. Authorized representatives are invited to pre-register one case. Under revised procedures this year, IRS service representatives will provide assistance via dedicated phone lines directly from the Brookhaven Campus. If the case cannot be resolved during the direct contacts, it will be monitored and assigned to an appropriate IRS expert for follow-up to resolution as appropriate. Pre-registration is strongly recommended to facilitate the smooth flow of these new procedures.

To expedite this process, please ensure the following actions have been completed:

- A signed original or copy of your Power of Attorney (Form 2848) is required to authorize IRS disclosure of confidential tax information.
- Complete the attached "Practitioner Case Resolution Sheet" in its entirety and forward it with your registration.

NYS CASE RESOLUTION

NYS Practitioner Case Resolutions Program

Bring your toughest case (one case per practitioner) to the Practitioner Case Resolution Room. NYS representatives with specialized experience will be available – by appointment only – to meet one-on-one with a practitioner to discuss a client's tax case. If the case can't be resolved on site, it will be assigned to an appropriate NYS representative for follow-up. Taxpayer representatives, who are bringing cases that are currently assigned, please email Mwisa Chisunka, Senior Tax Analyst at Mwisa.chisunka@tax.ny.gov in advance so that the appropriate research can be conducted. If the case cannot be resolved on the spot or requires further research, it will be monitored and assigned to an appropriate NYS tax expert for follow-up. Download form at www.litps.org.

CREST HOLLOW COUNTRY CLUB

Site of the 2012 LITPS

8325 Jericho Turnpike • Woodbury, NY 11797
516-692-8000 www.cresthollow.com
For directions see Crest Hollow Country Club's website

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See www.LITPS.org for details

Seminar Schedule

DAY ONE SCHEDULE AT A GLANCE

7:00 am to 7:45 am	Registration and Breakfast
7:00 am to 7:00 pm	Exhibit Area Open
8:00 am to 5:10 pm	Case Resolution Room
8:00 am to 10:30 am	Keynote Speakers - ***Mandatory Attendance*** *for **FULL Credit** for the Day*
10:30 am to 10:50 am	Morning Break
10:50 am to 12:30 pm	Concurrent Sessions
12:30 pm to 1:30 pm	Lunch
1:30 pm to 3:10 pm	Concurrent Sessions
3:10 pm to 3:30 pm	Afternoon Break & Exhibitor Raffles
3:30 pm to 5:10 pm	Concurrent Sessions
5:15 pm to 7:00 pm	Cocktail Party

Course 1011
KEYNOTE SPEAKERS (3 TAX CPE)
You must attend this course for a full day's credit.
Eliot Spitzer
Dr Pearl Kamer, *Long Island Chief Economist*

Course: 1021
SALES TAX OF MEDICAL PROFESSIONALS AND CONTRACTORS (TAX CPE) (CLE)
Mark L. Stone, CPA
This sales tax program will cover the NY rules that apply to medical practices and other professionals. Additionally we will go over the "capital improvement rules" and contractors' sales tax responsibilities. The second hour will be an interactive discussion where your questions will be answered. We encourage participants to come prepared with your most pressing sales tax scenarios.

Course: 1022
NYS RESIDENCY AUDIT & APPEALS PROCESS (TAX CPE) (CLE)
Karen J. Tenenbaum, Esq., CPA, LL.M. (Taxation); Yvonne R. Cort, Esq.; Leah Robinson, Esq., LL.M (Taxation); Christopher L. Bourell, Esq., LL.M (Taxation)
Be prepared for a NYS residency audit and the NYS appeals process with this review of domicile and statutory residency, including the Department's 2012 revised guidelines. This case study presentation will focus on the issues raised by recent residency cases and proposed legislation. We will look at how you can increase your clients' chances of a successful outcome, including how you can implement best practices in anticipation of a residency challenge.

Course: 1023
1041 PREPARATION WORKSHOP (TAX CPE) (CLE) (2 CE #G1U2N-T-00007-12-I)
Robert S. Barnett, CPA, Esq.
This workshop will include 1041 preparation considerations and a detailed working example including IRD and DNI calculations. Intermediate and advanced considerations will also be discussed including capital gain allocations, separate share rule, passive activity loss considerations, qualified revocable trust election and much more.

Course: 1024
THE TIDAL WAVE OF EMPLOYMENT CLAIMS; WHAT IT MEANS TO CPAS AND THEIR CLIENTS (TAX CPE) (CLE)
Glenn J. Franklin, Esq.
The number of wage and hour claims filed with the United States Department of Labor and the New York State Department of Labor has skyrocketed in 2012. Employees have filed lawsuits for overtime, minimum wage and spread of hours clogging the Federal courts. This session is designed to help the CPA navigate the employment and tax implications of this explosion of claims. Whether the CPA represents individual employees or companies, the latest issues will be discussed.

Course: 1025
USING TAX BASIS AND OTHER SPECIAL PURPOSE FRAMEWORKS PRESENTATIONS EFFECTIVELY (A & A CPE)
John Fleming, CPA, MBA
With the complexities and cost of GAAP financials, many practitioners have encouraged clients to use tax basis and other special purpose frameworks financial statements. This session will address special purpose frameworks reporting and disclosure requirements, including the AICPA interpretation and practice aid on special purpose frameworks.
Who should attend: Practitioners in public practice and CPAs who are responsible for the preparation of non-public, non-GAAP financial statements.

Course: 1026
THE MAZE OF 401(K) TYPE PLANS (TAX CPE) (CFP) (CLE) (2 CE# G1U2N-Q-00008-12-I)
Stephen Abramson, CPC, CLU, ChFC
Cash or deferred plans, CODAs, the precursor to 401(k) plans officially became what we now know as 401(k) plans in 1978. Although the non discrimination rules have changed the concept of 401(k) remains the same. The original plan design, the traditional 401(k) plan, has now become a maze of multiple plan design options including the Safe Harbor 401(k), the SIMPLE 401(k), the SIMPLE IRA, the Auto Enrol Safe Harbor 401(k) among others. This session seeks to clarify the various options focusing on pros and cons of each.

Course: 1027
MINIMIZE TAXES, MAXIMIZE WEALTH: UNDERSTANDING TAX DEFERRAL STRATEGIES WHEN SELLING REAL ESTATE (TAX CPE) (CFP) (CLE) (2 CE# G1U2N-T-00009-12-I)
Joseph M. Insalaco, CFP®, Todd Pajonas, Esq., Matthew Scheriff, CPA
This course will provide an overview of several important strategies used to minimize, defer or forgive the capital gain tax which may be due upon the sale of real estate, as well as the methods used to compute a capital gain tax and depreciation recapture. Understanding taxes is one of the key methods to maximizing the profitability of real estate transactions.

Course: 1031 Lunch Program
IDENTITY THEFT (1 TAX CPE)
Joseph Muscatello, Special Agent US Secret Service
This program will begin by defining Identity Theft; Types of ID Theft; ATM skimming; skimming devices displayed as well as going over cases and prosecution and the methods to reduce the risk. There will be Q & A before closing.

Course: 1032 Lunch Program
FEDERAL WAGE AND HOUR REQUIREMENTS FOR EMPLOYERS AND THEIR REPRESENTATIVES (1 TAX CPE)
Irv Miljoner, District Director, US Dept. of Labor
Labor and wages are among the highest operating costs for many businesses. Learn what you need to know to avoid liabilities and stay in compliance with federal wage and hour laws. Topics will include Minimum Wage, Overtime, Recordkeeping, Exemptions, other labor provisions, as well as audit and penalty information.

Course: 1033 Lunch Program
DON'T GET CAUGHT WITH YOUR DRAWERS OPEN: OFFICE SECURITY FOR TAX PREPARERS (1 MAP CPE) (1 CE# G1U2N-T-000010-12-I)
Robert Sick, CPA
This program will provide tax preparers with information and strategies to properly secure client personal information. IRS and FTC guidelines as well various federal and state laws require tax preparers to put in place office procedures to safeguard taxpayer data. Through lecture, discussion and examples, preparers will learn what to look for in assessing office security issues.

Course: 1034 Lunch Program
SALES TAX AND INTERNET TAXATION, DIGITAL PROPERTY AND HOW SALES TAX CAN RUIN YOUR APPETITE (1 TAX CPE) (1 CLE)
Mark L. Stone, CPA, MST
This program will discuss the effect that selling on the internet has on a company's sales tax collection responsibility. In addition, this course will cover New York's sales tax rules on digital property, ebooks, itunes and other electronic/digital property.

Course: 1035 Lunch Program
THE AFFORDABLE CARE ACT – EMPLOYER MANDATES (1 TAX CPE)
David Rubenzahl, Esq.
The Affordable Care Act includes a number of mandates that increase an employer's reporting responsibilities and, depending upon its size, its potential tax liabilities. This program provides an update on how current regulatory guidance implements these mandates and their potential effect on your clients.

Course: 1036 Just Lunch

Course: 1041
1040 UPDATE PART 1 (TAX CPE) (CFP) (CLE) (2 CE# G1U2N-U-00011-12-I)
Robert Katz, J.D., LL.M, and Neil Katz, J.D., LL.M, CPA
This presentation will focus on the tax law changes that affect the preparation of the 2012 Form 1040. In addition, there will be a discussion of the latest cases, rulings and regulations that affect the preparation of the 2012 Federal Income Tax Return.

Course: 1042
WHAT TO DO WHEN THE IRS KNOCKS ON YOUR DOOR (TAX CPE) (CLE) (2 CE# G1U2N-T-00013-12-I)
Karen J. Tenenbaum, Esq., LL.M. (Taxation), CPA; Yvonne R. Cort, Esq.;
IRS Gary T. Bove, Collection Group Mngr.
The IRS collection priorities and procedures have changed. Practitioners need to be familiar with these developments, and with techniques to assist taxpayers. This interactive panel presentation on IRS collections will discuss the recent updates in Offers in Compromise and the Fresh Start program, as well as liens and levies, Installment Agreements, and Collection Due Process appeals.

Course: 1043
REAL ESTATE ACTIVITIES (§754 INC.) (TAX CPE) (CLE) (2 CE# G1U2N-T-00014-12-I)
Robert S. Barnett, CPA, Esq. & Renato D. Matos, Esq.
This lecture will focus on a wide-range of real estate related tax concepts. Topics include new capitalization regulations, depreciation and recapture rules, real estate partnership considerations and recent cases concerning 1031 exchanges.

Course: 1044
RETIREMENT PLANNING STRATEGIES IN THE CURRENT ENVIRONMENT (TAX CPE) (CLE) (2 CE# G1U2N-Q-00015-12-I)
Alvin Rapp, Founder RPG Consultants
With the enactment of the Pension Protection Act of 2006 (PPA) and subsequent DOL Legislation, plan sponsors have more opportunities and choices for their plans than ever before. However, with those opportunities and choices comes an increased level of responsibility to understand and meet the new fiduciary requirements. The topics to be discussed will cover New Tends in the Retirement Plan Marketplace, New 408(b)(2) and 404(a)(5) Disclosure Rules, and DB & DC Highlights of the 2006 PPA.

Course: 1045
ACCOUNTING STANDARDS UPDATE (A & A CPE)
John Fleming, CPA, MBA
This session will provide an overview of changes made by accounting standards updates issued after June 2011. Only pronouncements which are relevant to local accounting firms or privately-held companies will be covered in detail. For other issues, a quick synopsis will be provided.

Who should attend: All firms, all staff, all CPAs primarily focused on privately-held companies – all accountants needing a good year-round update on recently issued accounting standards

Course: 1046
BUSINESS OWNER STRATEGIES FOR THE EXPECTED & UNEXPECTED (TAX CPE) (CFP) (CLE)
Audrey Kirwin, Financial Representative
Pivotal action steps to help business owners limit financially damaging "life" events. Retirement & transition of ownership are key components of planning so easily disrupted by death, disability or divorce. Learn to navigate & leverage changes in relevant laws & tax codes. Discussion of case studies, pitfalls, & strategies to prepare you and your clients.

Course: 1047
CLOUD COMPUTING: WHAT IT MEANS TO ACCOUNTANTS (SK CPE)
Presented by QuickBooks ProAdvisor
Cloud computing is more than just a buzz word- it brings important benefits that will impact your business. Get up to speed on what those benefits are and how you can apply them to your business.

Course: 1051
1040 UPDATE PART 2 (TAX CPE) (CFP) (CLE) (2 CE# G1U2N-U-00012-12-I)
Robert Katz, J.D., LL.M, and Neil Katz, J.D., LL.M, CPA
This is a continuation of Course 1041

Course: 1052
NEW YORK TAX UPDATE (TAX CPE) (CFP) (CLE)
Mark S. Klein, Esq., William J. Comiskey
Repeat course is 2011
This program will cover the latest developments in New York State's budget bill, as well as new decisions, rulings, and administrative releases affecting New York's corporate, personal income, and sales and use taxes. The impact of recent Tax Department enforcement initiatives will also be discussed.

Course: 1053
UNDERSTANDING MEDICAID – FROM PLANNING OPTIONS TO THE DIFFERENCES BETWEEN MEDICAID AND IRS RULES (TAX CPE) (CFP) (CLE)
Paul Hyl, Esq
Undoubtedly, more and more of your clients are engaging in Medicaid planning to protect their assets. In many areas, the Internal Revenue Code and regulations vary greatly from the laws, rules and regulations governing Medicaid. This course will examine and explain common Medicaid planning techniques and the differences and nuances between the IRS rules and Medicaid rules.

Seminar Schedule

Course: 1054
PRACTICE MANAGEMENT TECHNOLOGY IN TODAY'S FIRM (MAP CPE)
Michael Giardina, CEO, Office Tools Professional
What can Practice Management software provide for today's firm? Is it simply a glorified time and billing system? We will take a detailed look at how practice management software has evolved, what best practices are and what to look for when evaluating applications. We will also look at implementation pit falls and how to plan a successful transition to Practice Management.

Course: 1055
RECENT COMPILATION AND REVIEW ISSUES (A & A CPE)
John Fleming, CPA, MBA
SSARS 19 effectively rewrote and codified most of the compilation and review standards. This program is designed to address these revised standards.
Who should attend: Practitioners who perform compilations and reviews for small business clients.

Course: 1056
THE COST OF BUSINESS: IS IT DEDUCTIBLE OR MUST YOU CAPITALIZE? (SK CPE) (CFP) (2 CE# G1U2N-T-00016-12-I)
IRS SB/SE Office of Chief Counsel; Deborah Aloof, Esq.
This course will examine the rules regarding the deduction and capitalization of the costs of tangible business property, as found in Internal Revenue Code sections 162 and 263(a). It will include a discussion of the Treasury Regulations and Revenue Procedures issued earlier this year. Special emphasis will be placed on the distinction between repairs and improvements.

Course: 1057
WORKFLOW INTELLIGENCE IN THE CLOUD (MAP CPE)
Zac Meyer, Thomson Reuters
Automated business processes translate into tremendous time savings and greater profit potential. And when you combine those automated processes with the convenience and security of the cloud, those benefits multiply. Don't miss this opportunity to see how you can create a customized, automated workflow in the cloud and have the ability to easily monitor activity from start to finish.

DAY TWO
SCHEDULE AT A GLANCE

7:00 am to 7:45 pm	Registration and Breakfast
7:00 am to 7:00 pm	Exhibit Area Open
7:50 am to 8:40 am	Keynote Speakers - ***Mandatory Attendance** for **FULL Credit** for the Day*
8:00 am to 5:00 pm	Case Resolution Room
8:40 am to 8:55 am	Morning Break
8:55 am to 10:35 am	Concurrent Sessions
10:35 am to 10:50 am	Morning Break
10:50 am to 12:30 pm	Concurrent Sessions
12:30 pm to 1:30 pm	Lunch
1:35 pm to 3:15 pm	Concurrent Sessions
3:15 pm to 3:35 pm	Afternoon Break & Exhibitor Raffles
3:35 pm to 5:15 pm	Concurrent Sessions
5:15 pm to 7:00 pm	Cocktail Party

Course: 2001
KEYNOTE SPEAKER (1 TAX CPE)
***Thomas H. Mattox,** Commissioner NYS Department of Taxation and Finance*

Course: 2011
NEW YORK TAX UPDATE (TAX CPE) (CFP) (CLE)
Mark S. Klein, Esq., William J. Comiskey, Esq.
This is a repeat of Course 1052
This program will cover the latest developments in New York State's budget bill, as well as new decisions, rulings, and administrative releases affecting New York's corporate, personal income, and sales and use taxes. The impact of recent Tax Department enforcement initiatives will also be discussed.

Course: 2012
IRS CRIMINAL INVESTIGATION AND IDENTITY THEFT (TAX CPE) (2 CE# G1U2N-T-00017-12-I)
Alan M. Katz, Special Agent
We will first provide an overview of IRS-CID. We will then discuss what Identity Theft is, how it is being used by criminals and what IRS-CID's role is in combating Identity Theft. Our presentation will also include information on where to report Identity Theft and what the participants' clients need to do if they are victims of Identity Theft.

Course: 2013
STRATEGIES TO BUILD RETIREMENT INCOME (TAX CPE) (CFP)
Kenneth R. Greenblatt, CFP®
This Program will cover information on how you can help your clients to determine your retirement needs as well as the accumulation methods to reach their retirement goals. Guidelines for IRA and Roth IRA contributions will be discussed as well as conversion options. Business retirement options for self-employed such as SEP, Single K, Profit Sharing and Defined Benefit plans will be covered. We will also address retirement plans offered on a corporate level. Finally, strategies for additional retirement options such as variable annuities and insurance programs will also be discussed.

Course: 2014
DIVORCE SETTLEMENT: NOT ALL ASSETS AND INCOME ARE CREATED EQUAL (TAX CPE) (CFP) (CLE)
Stephen A. Linker, CPA, CVA, CFF, DABFA & Ada L. Hasloecher, Mediator
The presentation will cover: 1) The financial and tax attributes and elements of risk attributed to assets and liabilities, 2) The information concerning assets, liabilities, and income obtainable from the parties' tax returns, 3) Other information to be analyzed, 4) An overview on quantifying marital property, and 5) Tax effect of proposed settlement options.

Course: 2015
HOW TO GET FINED $100,000 BY IRS AND SUED BY YOUR CLIENTS (TAX CPE) (CLE) (2 CE# G1U2N-T-00018-12-I)
Lance Wallach, CLU, CHFC
Accounting speaker of the year explains abusive, listed, tax shelters, insurance annuity products sold to your clients including popular retirement 412i, 419 section 79 captive insurance life settlements premium finance reverse mortgages etc. that can get you in trouble. Accountants signing returns face mandatory $100,000 IRS fine. Learn disclosure requirements to avoid large penalties, both to yourself and your client. This popular program helped over 100,000 accountants avoid IRS fines and client lawsuits.

Course: 2016
FINANCIAL STATEMENTS & OBTAINING BUSINESS CREDIT - INSIDE THE LENDER'S VIEW (A & A CPE)
Kevin Ferryman, SVP Capital One Bank
This presentation will cover information banks need with a credit application and the application process. This will lead into the critical factors used to evaluate and structure the loan. Finally, the discussion will focus on how you can help clients to be prepared for borrowing.

2012 Long Island Tax Professionals Symposium

Course: 2017
EXECUTIVE BRIEFING ON THE HEALTHCARE MARKETPLACE (TAX CPE)
Todd C. Bellistri, CLU
This session will emphasize on the current state of the health insurance marketplace; identifying opportunities, discussing strategies for addressing the new marketplace and where do we go from here.

Course: 2021
TAX ASPECTS OF THE AFFORDABLE CARE ACT (TAX CPE) (CFP) (2 CE)
Robert L. Goldfarb, CPA; Steven Greenberg, CPA
This program will be an update on the tax aspects of the Health Care Act and how to prepare for provisions that will be effective January 1, 2013 and later!

Course: 2022
RETIREMENT PLAN CONCEPTS & STRATEGIES: INDIVIDUAL & EMPLOYER MARKETPLACE (TAX CPE) (CFP) (2 CE# G1U2N-Q-00019-12-I)
Moderator - Robert Lozzi, CFP®, Speaker – Stuart Farmer, ChFC, CLU
We will discuss individual and employer sponsored retirement plans in the 2012 marketplace. Individual retirement accumulation concepts include traditional and Roth IRA's, Roth conversions without taxation, 72(t), 72(q), RMD's, Inherited IRAs and Annuities. Regarding retirement plans, the various kinds of retirement plans available to business owners and employees will be presented

Course: 2023
STRATEGIES TO PROTECT RETIREMENT INCOME (TAX CPE) (CFP)
John Baldi, CFP®
This Program will cover several important protection components that are vital to helping your clients protect themselves from retirement INVADERS. Although retirement planning can be very comprehensive, this presentation will focus on a few topics that are important for protecting your clients during retirement. We will specifically discuss long term care and how it has evolved to what it is today and projections for the future, the pros and cons of trusts in the current environment, how planning today can help avoid headaches in the future should Medicare/Medicaid issues arise and finally, Viatical insurance options for your clients – how they work, who might be a candidate and when it might make sense.

Course: 2024
COMPILATION AND REVIEW UPDATE (A & A CPE)
Frank A. Gallo, CPA, MBA
The objective is to understand the latest developments in compilation and reviews as related to closely held businesses. We will review the latest accounting and review pronouncements including Other Comprehensive Basis of Accounting ("OCBOA") financial statements. It will enable participants to understand the new requirements for accounting and review engagements and how they will affect their practice.

Course: 2025
CT/NJ TAX UPDATE (TAX CPE) (CFP)
(CT) Louis B. Schatz, Esq. & (NJ) Alan J. Preis, CPA, P.C.
Practitioners representing Connecticut and New Jersey clients will discuss 2011 and 2012 legislative developments, which were significant. In addition, the practitioners will provide a review of recent case law and administrative and regulatory developments that affect business and individual income tax returns. Recent developments in nexus policies of each state will also be discussed.

Course: 2026
TOP TECHNOLOGY TRENDS & APPS THAT YOU CAN PUT TO WORK TODAY (MAP CPE)
A David Bergstein, CPA, CITP, CGMA
This session will cover processes and tools that firms are employing today to save time, be more efficient and more profitable. This is a digital world that requires CPA firms to employ new technologies including tablets and other mobile devices to stay connected

Course: 2027
NYS TAX FILING TRENDS AND NEW AND EXPANDED SERVICES (TAX CPE)
Andrew Morris, NYS Dept.of Tax & Finance Director, Business Tax Processing
The NYS Department of Taxation and Finance will present 2012 tax filing trends with particular focus on new and expanded services offered to taxpayers and the tax practitioner community.

Course: 2031 Lunch Program
INDEPENDENT CONTRACTOR OR EMPLOYEE? WHY PROPER CLASSIFICATION IS SO IMPORTANT IMPORTANT (1 TAX CPE) (1 CLE) (1 CE# G1U2N-T-00020-12-I)
Mark Reiss, Esq.
There is a misconception that an employer can choose whether to enter into an employment relationship or independent contractor relationship with an individual. The cost of misclassification can be very costly. This course will discuss some of the more common pitfalls of employee misclassification and how to best avoid them.

Course: 2032 Lunch Program
MARKETING YOUR PRACTICE AS A TECH-SAVVY FIRM (1 MAP CPE)
Zac Meyer, Thomson Reuters
You already know that technology can help you increase efficiency and automate your workflow. But did you know it can also be a powerful marketing tool for retaining current clients and attracting new ones? Being a tech-savvy firm can even help you with attracting and retaining top employees. In this session, see how technology can enhance your business and increase your bottom line.

Course: 2033 Lunch Program
REAL-LIFE ESTATE PLANNING UTILIZING LIFE INSURANCE (1 TAX CPE) (1 CFP) (1 CLE)
Alan Kahn, CPA, Kevin Matz, Esq., CPA, LL.M (Taxation)
An interactive panel discussion where we will examine case studies of high net worth families and address issues such as Estate tax uncertainty, qualitative aspects of your estate plan, and life insurance considerations.

Course: 2034 Lunch Program
S CORPORATION LOSSES, BASIS, LOANS & OPEN ACCOUNT DEBT RULES (1 TAX CPE) (1 CLE) (1 CE# G1U2N-T-00021-12-I)
Robert S. Barnett, CPA, Esq.
S corporation basis and loss utilization are frequently disputed by the Internal Revenue Service. Come hear about the new open account debt regulations and how they impact all S corporation loans and advances. This talk is designed to include a workshop of actual calculations taken from the Treasury Regulations.

Course: 2035 Lunch Program
GOING PAPERLESS? WHAT DOES THIS REALLY MEAN? (1 MAP CPE)
James N. Filicetti, CPA
Going paperless is a lot more than saving paper. From Scanning mail to delivering your final documents through secure portals, let's discuss the best practice approach. Through Discovery, Planning, Implementation and Follow Through, we can together build a premier workflow solution for you and your firm.

Course: 2036 Just Lunch

Course: 2041
1040 UPDATE PART 1 (TAX CPE) (CFP) (CLE) (2 CE# G1U2N-U-00011-12-I)
Robert Katz, J.D., LL.M, and Neil Katz, J.D., LL.M, CPA
This is a repeat of Course 1041
This presentation will focus on the tax law changes that affect the preparation of the 2012 Form 1040. In addition, there will be a discussion of the latest cases, rulings and regulations that affect the preparation of the 2012 Federal Income Tax Return.

Course: 2042
MONITORING LIFE INSURANCE POLICIES IN TRUSTS (TAX CPE) (CFP) (CLE)
Lee Slavutin, MD, CLU
We will address the following questions: 1. Why does a trustee need to monitor the policies held in a trust? 2. What guidance is available to the trustee? 3. What can we learn from the three cases that have been litigated? 4. What does the trustee monitor, and 5. Can the trustee delegate this responsibility?

Course: 2043
STRATEGIES TO PREVENT OUTLIVING RETIREMENT INCOME (TAX CPE) (CFP)
Christopher A. Danzer, Financial Advisor
When should you begin to withdraw money from your accounts? The answer is vitally important and needs to be evaluated on an individual basis. We will look at how to go about answering this question, when to begin to take social security and the effect of taxation in designing a withdrawal strategy. Topics covered will include; reverse mortgages, asset allocation, living benefits, distribution planning theories and techniques.

Course: 2044
COOPERATIVE AND CONDOMINIUM UPDATE (A & A CPE)
Michael A. Esposito, CPA; Joel Miller, Esq.; James Goldstick & Gerald Niemeier
An update for practitioners on accounting, auditing, legal, tax, finance and property management issues related to cooperative housing corporations and condominium associations.
Who should attend: Designed for practitioners who represent and perform audits of cooperative housing corporations and condominium associations.

Course: 2045
MY FAVORITE FLAVORS OF SPECIAL NEEDS TRUSTS (TAX CPE) (CFP) (CLE)
Vincent Russo, Esq., LL.M., CELA
Special needs trusts come in more than one flavor. Each type of special needs trust has its own unique characteristics, and its own tax ramifications. This session will review the various types of special needs trusts used in representing special needs beneficiaries and their loved ones, and the tax implications of each.

Course: 2046
THE FUTURE OF M&A AND ITS IMPACT ON SUCCESSION STRATEGY (MAP CPE)
John Raspante, CPA; Joe Tarasco, Accountants Advisory Group, LLC
We will discuss how M&A is transforming the CPA firm marketplace and its competitive effects in regard to competition for quality clients and staff. The presentation includes a discussion on M&A trends and predictions for the future and its impact on CPA firm succession strategy.

Course: 2047
NYC/NYS UPDATE (TAX CPE) (CLE)
NYC Dept. of Finance: Howard Reiss and William Hernandez
NYS: Mwisa Chisunka
This course is an update of NYC Finance Payment's Operations including e-filing, filing errors, new forms, new payment options, property tax exemption programs and reporting requirements. Also included is General Corporation Tax request to use alternative allocation method, bank tax business allocation percentages (2012), extension of the Gramm-Leach -Bliley Act and economic nexus-credit card companies. NYS Tax Law Updates will include forms changes for the upcoming season, and new guidance and any pertinent advisory opinions.

Course: 2051
1040 UPDATE PART 2 (TAX CPE) (CFP) (CLE) (2 CE# G1U2N-U-00012-12-I)
Robert Katz, J.D., LL.M, and Neil Katz, J.D., LL.M, CPA
This is a continuation of Course 2041
This is a repeat of Course 1051

Course: 2052
LIFE INSURANCE TAX TRAPS TO AVOID (TAX CPE) (CFP) (CLE)
Lee Slavutin, MD, CLU
Life insurance is a unique asset that enjoys income and transfer tax exclusions and exemptions. We should do everything we can to protect and use these tax benefits. We will address the following questions: 1. What are the important income, gift, estate and GST tax traps that involve life insurance? 2. What is the "most serious" income tax mistake involving life insurance? and 3. What is the single most valuable tool to detect and prevent tax errors involving life insurance?

Course: 2053
STRATEGIES FOR TRANSFERRING WEALTH (TAX CPE) (CFP) (CLE)
Moss Kaufman, CFP®
A team of financial planners, attorney, investment professionals, and life insurance experts will make a panel presentation and analyze several case studies using both conventional and creative approaches to efficiently transfer assets. Current and posthumous transfer options will be explored. A variety of different ownership arrangements, estate documents, and challenges will be discussed. Special attention will be paid to IRA Beneficiary arrangements and distribution planning.

Course: 2054
HOW TO HAVE YOUR CAKE AND EAT IT TOO! KEYS TO SUCCESSION PLANNING THROUGH MERGER OR SALE OF YOUR PRACTICE (MAP CPE)
Max T. Krotman, Esq.
Attend and Participate in an interactive Colloquium of 3 local Professionals who have been through this process successfully. Learn how to maximize the value of your practice. Find out how you can also continue to work part time or full time for as long as you want. Improve the quality of your professional life and simultaneously take good care of your staff and your clients.

Course: 2055
ERISA RULES AND 401(K) -YOUR CLIENTS WILL THANK YOU! (TAX CPE)
Ary Rosenbaum, Esq.
Discover the Ethos Process and how it protects your clients from fiduciary liability. Show them how to save Substantial Dollars for themselves with little or no cost for employees. Alert them to 408(b)(2) and the updated ERISA regulations. Give your clients the tools they need for a successful retirement plan.

Course: 2056
THE STATUS OF SAME-SEX MARRIAGE AFTER THE FIRST ANNIVERSARY OF THE NEW YORK MARRIAGE EQUALITY ACT (TAX CPE) (CLE)
(2 CE# G1U2N-Q-00022-12-I)
Joseph G. Milizio, Esq.
2011 recognition of same-sex marriage in New York has brought about many changes for the lesbian and gay community. What has changed and what hasn't after one year? This session will provide an overview of the status of same-sex marriage in New York and the lack of recognition for federal purposes. State and federal Income and estate tax issues will be addressed, as well as marriage rights and obligations, divorce, children and adoption, recognition by other states and the current status of the Defense of Marriage Act.

Course: 2057
QUICKBOOKS ACCOUNTING PRODUCT UPDATE (SK CPE)
Presented by QuickBooks ProAdvisor
This program will introduce you to new tools that provide more flexible methods for working with your clients. QuickBooks data; Experience the new design interface and learn how it can help you and your clients work more efficiently and faster while completing everyday accounting tasks. This program will give you the opportunity to evaluate the right QuickBooks products for your clients.

DAY THREE SCHEDULE AT A GLANCE

7:00 am to 7:45 am	Registration and Breakfast
7:30 am to 3:30 pm	Technology Fair
7:50 am to 8:40 am	Keynote Speakers - ***Mandatory Attendance*** *for* ***FULL Credit*** *for the Day*
8:00 am to 5:00 pm	Case Resolution Room
8:40 am to 8:55 am	Morning Break
8:55 am to10:35 am	Concurrent Sessions
10:35 am to10:50 am	Morning Break
10:50 am to12:30 pm	Concurrent Sessions
12:30 pm to 1:30 pm	Lunch
1:35 pm to 3:15 pm	Concurrent Sessions
3:15 pm to 3:25 pm	Afternoon Break & Exhibitor Raffles
3:25 pm to 5:05 pm	Concurrent Sessions

Course: 3001
KEYNOTE SPEAKER (1 TAX CPE)
Mark Whitacre, Ph.D.

Course: 3011
COMPLETE TAX UPDATE FOR YEAR 2012 PART 1 (TAX CPE) (CFP) (CLE)
(2 CE# G1U2N-U-00023-12-I)
Professor Samuel A. Dyckman, CPA
A full analysis and update on the individual and corporate tax law changes applicable in the preparation of the 2012 tax returns.

Course: 3012
BASIC INCOME TAX REFRESHER COURSE – PART 1 (TAX CPE) (CFP) (CLE)
(2 CE# G1U2N-U-00025-12-I)
Gary S. Sanders, CPA, Michael D. Rubinstein, CPA
This course is intended for entry level staff members of firms, as well as tax practitioners and preparers that seek a refresher of the various laws and interaction of the forms involved in preparing a complete individual tax return, at the basic level. We will discuss and illustrate for those that attend concepts and strategies to use in a discussion format to assist for the upcoming tax season. In addition, we will highlight the effects of changes and proposed changes as they affect the return.

Course: 3013
FEDERAL SCHEDULE K-1 ISSUES FOR TAX RETURN PREPARERS (TAX CPE)
Carolyn Turnbull, CPA, MST
The federal partnership Schedule K-1 provides information that is essential for the proper filing of the partner's income tax return. This program will highlight the key items a tax return preparer will face when preparing a federal partnership Schedule K-1, including the following: The classification and allocation of partnership liabilities; Reporting of a partner's capital account; Allocation and reporting of a partner's distributive share of partnership income, gain, loss, deduction and credits; Calculation of a partner's self-employment earnings and Reporting of passive activities.

Course: 3014
TAX FREE RETIREMENT (TAX CPE) (CFP)
Victor Muro, MBA, CLU, ChFC
How to defer taxes as your accumulated cash value grows and potentially access that cash value using income tax free policy loans and withdrawal to use for retirement income or other needs. Other topics of interest will be on how to save for retirement using strategies such as; After Tax, Tax-Deferred, Pre Tax and Section 79 strategies.

Course: 3015
THE MYTHS & REALITIES AND TAX TREATMENT OF QUALIFIED LONG TERM CARE INSURANCE (TAX CPE) (CFP) (CLE)
Natalie Karp, MBA, CLTC and Rona Loshak, MBA, CLTC
An update on the current environment of LTC Insurance with a discussion of solutions that include traditional LTC, NYS Partnership Plans, and asset based or linked benefit solutions using Universal Life and LTC. Through case studies we will discuss suitability, the true cost of self-insuring and highlight tax incentives (credits and deductions) for individuals, business owners and the self employed

Course: 3016
ESTATE PLANNING IN 2012: WHAT DO WE DO NOW? (TAX CPE) (CFP) (CLE)
Neil Katz, J.D., LL.M, CPA
With some significant changes to the new Estate and Gift tax rules on the horizon, the session will focus on what is available for planning for estates of all sizes. From the basic decisions relating to implementing credit shelter planning or utilizing portability to a review of complicated estate freeze techniques, we will explore the techniques available to clients and the changes that may be coming in 2013.

Course: 3017
ADVISING THE COLLEGE BOUND FAMILY (TAX CPE) (CFP) (CLE)
Jan and Tony Esposito, CFP®
Much is changing in the world of financial aid, college loans, scholarships and college admissions. Learn what you need to know about the new trends in college discounting and how to help your clients protect their assets. Included will be a brief overview of financial aid forms.

Course: 3021
COMPLETE TAX UPDATE FOR YEAR 2012 PART 2 (TAX CPE) (CFP) (CLE) (2 CE# G1U2N-U-00024-12-I)
Professor Samuel A. Dyckman, CPA
This is a continuation of Course 3011
A full analysis and update on the individual and corporate tax law changes applicable in the preparation of the 2012 tax returns.

Course: 3022
BASIC INCOME TAX REFRESHER COURSE – PART 2 (TAX CPE) (CFP) (CLE) (2 CE# G1U2N-U-00026-12-I)
Gary S. Sanders, CPA, Michael D. Rubinstein, CPA
This is a Continuation of Course 3012

Course: 3023
MARKETING FOR DUMMIES - THE NUTS AND BOLTS ON HOW TO MARKET YOUR FIRM (2 MAP CPE)
Eric Rogers, CPA
This course will be presented by a CPA who used penny marketing and grew his practice from nothing to over a Million Dollars a Year. This high energy fun session will give every attendee 10 ideas to immediately bring back to the firm to implement and get more "A" level clients.

Course: 3024
USING SOCIAL MEDIA TO ENHANCE YOUR MARKETING PLAN (2 MAP CPE)
Regina Kempster
Social Media has become a standard element within marketing for businesses today. Come learn the benefits offered by the top sites, how to use them to promote your business and how to take control of your online presence.

Course: 3025
IDENTITY THEFT; THE #1 CRIME IN AMERICA (2 SK CPE)
Armando D'Accordo, President, CMIT Solutions
In this session you will learn where you're vulnerable and be made aware of recent scams and social engineer efforts. You will also learn the best practices for protecting information for you and your clients. If you want to stay compliant and safe, this session is a MUST!

Course: 3026
M & A: A DEEP DIVE INTO ONE OF THE HOTTEST TRENDS IN THE PROFESSION (TAX CPE) (CLE)
Bill Carlino, Transition Advisors, Robert Fligel, CPA, Eliot Lebenhart, CPA & Ken Hauptman, CPA
In 2011, more than half of the Top 100 firms completed at least one merger and nearly 100 M&A deals have closed over the past six months. We invite you to join our expert panel to discuss how merger-mania is reshaping the accounting landscape. We will address critical topics and strategies in the M&A arena including but not limited to; deal structures, valuations, succession planning, when not to merge, due diligence do's and don'ts, critical contact issues, and war stories from the front lines.

Course: 3027
KEY CIRCULAR 230 PROVISIONS ABOUT WHICH TAX PRACTITIONERS SHOULD KNOW (TAX CPE) (2 CE# G1U2N-T-00027-12-I)
IRS - Karen L. Hawkins, Director, Office of Professional Responsibility
The Director of the Office of Professional Responsibility will discuss key regulations contained in Circular 230 of which every tax professional should be aware, including: general and specific due diligence and competency provisions, conflicts of interest, handling taxpayer refund check, and your obligations when employing others.

Course: 3031 Lunch Program
SOCIAL MEDIA AND THE WORKPLACE: BEST PRACTICES FOR AVOIDING LIABILITY (1 SK CPE) (1 CLE)
Andrew W. Singer, Esq.
Mr. Singer will discuss myriad and unique legal risks stemming from employees' use of social media. Andrew will address how social media implicates privacy concerns; restrictive covenants; confidentiality; discrimination; the NLRA; FTC Guidance; productivity; I.P.; tort liability; using sound judgment; and implementing social media policies.

Course: 3032 Lunch Program
SMART PLANNING STRATEGIES AND THE NEW REVERSE MORTGAGE, GETTING PAST THE MYTHS AND EXPLORING THE CURRENT REALITIES (1 TAX CPE) (1 CFP)
Karin Davis & Michael Vernon, Genworth Financial
This presentation will address some financial planning strategies using the New Reverse Mortgage product that can be part of every retirement plan. We will go over three specific strategies to help reduce the risk associated with increased life expectancy and also market volatility. Discussion of key product features and recent innovations along with examples will be included.

Course: 3033 Lunch Program
UNLEASH THE POWER OF YOUR IPAD (1 MAP CPE)
Ken Hale, Glasser Tech, LLC
Untether yourself from the office and increase productivity and billable hours. Learn how to use the iPad for collaboration, research, connecting to your office, as well as applications that are accounting specific and so much more... Current and prospective iPad owners will walk away empowered to increase their productivity immediately.

Course: 3034 Lunch Program
HEALTHCARE REFORM (1 TAX CPE) (1 CLE)
ADP Associate
This course provides an overview of various aspects of the Affordable Care Act (Healthcare Reform) with a focus on implications for small businesses. We will explore some trends within the healthcare marketplace along with specific provisions of the law and their implementation. Also discussed will be the Individual Mandate and its impacts, including the available small business tax credit. The program will cover trends influencing the affordability of healthcare, including Consumer-Driven Health Plans (CDHP's) and wellness programs, and addressing the current status of state exchanges. Participants will walk away with both a broad-based knowledge of Healthcare Reform and some specific impacts within the small business community

Course: 3035 Just Lunch

Course: 3041
COMPLETE TAX UPDATE FOR YEAR 2012 PART 1 (TAX CPE) (CFP) (CLE) (2 CE# G1U2N-U-00023-12-I)
Professor Samuel A. Dyckman, CPA
This is a repeat of course 3011
A full analysis and update on the individual and corporate tax law changes applicable in the preparation of the 2012 tax returns.

Course: 3042
ELDER CARE ADVOCACY AND THE MEDICAID APPLICATION PROCESS (TAX CPE) (CFP) (CLE)
Stuart H. Schoenfeld, Esq.
Applying for Medicaid benefits begins with an effective strategy to protect and preserve the family's resources. The discussion will focus on available planning alternatives for elderly and disabled individuals requiring guidance for the years ahead. Learn about the planning process and how effective advocacy will ensure that clients and their families receive the care and support they need. This presentation will be made using real life fact patterns and will include a discussion on recent changes to Medicaid rules and procedures.

Course: 3043
THE TECH-SAVVY CLIENT IS HERE—ARE YOU READY? (2 MAP CPE)
Zac Meyer, Thomson Reuters
Cloud computing, client portals, and mobile technology are some of the hottest topics in the profession right now. The reason is simple: Clients are becoming more tech-savvy, and their expectations are changing. They expect the same convenient online services offered by banks and other financial services. And it's not just the clients who expect more–employees want to work for a firm that offers these types of advanced services, as well. In this session, we'll discuss why implementing online services is so important for retaining clients and employees, and how successful firms have made it happen.

Course: 3044
CHANGES ARE COMING TO COMPILATIONS AND REVIEWS (AGAIN)! (A & A CPE)
Henry J Krostich, CPA.CITP
SSARS 19 just made significant changes to the compilation and review standards, and this program will review those requirements which are still effective, at least through the end of 2014. The Exposure Drafts issued by the AICPA this past summer and fall, potentially making major changes in these standards will also be discussed, from the practitioner's, peer review and NYS regulatory perspectives.

Course 3045
SALES TAX AUDITS (TAX CPE)
Nonie Manion, Director of Tax Audits, Dept. of Tax & Finance
Hear from New York State about recent modification to sales tax audit selection methods and updates on their audit processes. Nonie Manion, Director of Tax Audits will talk about New York State's increased use of data analytics, books and records requirements, and the use of indirect data verification methods when books and records are incomplete.

Course: 3046
LACERTE PROGRAM (SK CPE)
Jim Buffington, CPA
TBA. See website for description.

Course: 3047
PASSIVE ACTIVITY LOSSES & GROUPINGS (TAX CPE) (CLE) (2 CE# G1U2N-T-00028-12-I)
Robert S. Barnett, CPA, Esq.
This lecture will describe recent events and revenue procedures to assist practitioners in advising clients and preparing tax returns. Topics include passive activity groupings, real estate professionals, participation requirements, defining activities, S corporation and partnership considerations, and the self-rental rules.

Course: 3051
COMPLETE TAX UPDATE FOR YEAR 2012 PART 2 (TAX CPE) (CFP) (CLE) (2 CE# G1U2N-U-00024-12-I)
Professor Samuel A. Dyckman, CPA
This is a continuation of course 3041
This is a repeat of course 3021

Course: 3052
REAL WORLD APPLICATION OF CIRCULAR 230 AND OTHER STANDARDS OF TAX PRACTICE (TAX CPE) (CLE) (2 CE# G1U2N-E-00029-12-I)
Megan L. Brackney, Esq.
This program will discuss Circular 230 and other standards of tax practice including the AICPA's Statements on Standards for Tax Services and the civil penalty standards and criminal provisions of the IRC. We will discuss real-world situations where the tax practitioner is faced with difficult ethical decisions, including when it is permissible to rely on a client's representations, conflicts of interest, and communication with the government during audits and investigations.

Course: 3053
BUSINESS VALUATIONS-ARE THE STANDARDS DIFFERENT? (TAX CPE) (CFP) (CLE) (2 CE# G1U2N-T-00030-12-I)
Anthony Basile, Ph.D., CPA
We will discuss the various business valuation standards that are required by different accrediting agencies as well as the IRS. Topics will include the requirements of several valuations standards, estate and gift tax filings with valuations, IRS preparer penalties for valuations and other valuation issues.

Course: 3054
STATUTE OF LIMITATIONS (TAX CPE) (CLE)
Frank Degen, EA, USTCP
The general rules are simple - 3 years to assess tax and 10 years to collect the assessed tax. This session will look at some common SOL issues practitioners may encounter in their practice. Topics include amended returns, FATCA, SFRs and other exceptions to the general rules.

Course: 3055
TBA. See website for description.

Course 3056
FIVE IMPORTANT CHANGES YOU MUST KNOW ABOUT THE INSURANCE INDUSTRY (TAX CPE) (CFP) (CLE)
Henry Montag, CFP®, CLTC
This program will provide you with five (5) state of the art best practice ideas as a result of the recently enacted Pension Protection Acts' next generation of "Linked /Combo Products" which combines Life, Long Term Care Insurance and Annuities. Discussions of tax strategies & background information will show you how to have them work together for you & your clients' best interest.

Course: 3057
S & C CORPORATION UPDATE (TAX CPE) (CFP) (CLE) (2 CE# G1U2N-U-00031-12-I)
Robert S. Barnett, CPA, Esq.
This program will explore recent developments in corporate taxation. Important tax cases and rulings will be explored. Basis considerations loss utilization, intercompany transactions, imputed interest, self-rental, reasonable compensation and employment issues will be discussed.

2012 Long Island Tax Professionals Symposium

Seminar Schedule

DAY 1	SESSION 1	SESSION 2	SESSION 3	SESSION 4	SESSION 5	SESSION 6	SESSION 7
8:00 am- 10:30 am	Mandatory session for full day's credit	KEYNOTE SPEAKERS: Course 1011	8:15 - 9:30 AM **ELIOT SPITZER** 9:30 - 10:30 AM **DR. PEARL KAMER**		**Before registering, be sure to visit www.LITaxSymposium.org for any updates or modifications to the program**		
10:50 am- 12:30 pm	❑ Sales Tax of Med. Prof. & Contractors **Course 1021**	❑ NYS Residency Audit & Appeals Process **Course 1022**	❑ 1041 Preparation Workshop **Course 1023**	❑ Tidal Wave of Employment Claims **Course 1024**	❑ Tax Basis & Special Purpose Frameworks **Course 1025**	❑ The Maze of 401K Type Plans **Course 1026**	❑ Minimize Taxes, Maximize Wealth Re: Real Estate **Course 1027**
12:30 pm - 1:30 pm LUNCH BREAK	❑ Identity Theft **Course 1031**	❑ Fed Wage & Hour Requirements for Employers **Course 1032**	❑ Don't Get Caught w/Your Drawers Open - Office Sec. **Course 1033**	❑ Sales Tax & Internet Taxation **Course 1034**	❑ Affordable Care Act - Mandates **Course 1035**	❑ Just Lunch **Course 1036**	
1:30 pm- 3:10 pm	❑ 1040 Update Part 1 **Course 1041**	❑ What To Do When The IRS Knocks **Course 1042**	❑ Real Estate Activities **Course 1043**	❑ Retirement Planning Strateg. **Course 1044**	❑ Accounting Standards Update **Course 1045**	❑ Bus. Owner Strategies **Course 1046**	❑ Cloud Computing **Course 1047**
3:30 pm- 5:10 pm	❑ 1040 Update Part 2 **Course 1051**	❑ NY Tax Update **Course 1052**	❑ Understanding Medicaid **Course 1053**	❑ Practice Mgmt Technology **Course 1054**	❑ Compilation & Review Issues **Course 1055**	❑ Cost Of Bus.- Deductible? **Course 1056**	❑ Workflow In The Cloud **Course 1057**
COCKTAIL PARTY FOR ALL PARTICIPANTS 5:15 - 7:00 pm – ON THE EXHIBIT FLOOR							
DAY 2	**SESSION 1**	**SESSION 2**	**SESSION 3**	**SESSION 4**	**SESSION 5**	**SESSION 6**	**SESSION 7**
7:50 am 8:40 am	Mandatory session for full day's credit	Course 2001 KEYNOTE SPEAKER: Commissioner Thomas Mattox					
8:55 am- 10:35 am	❑ NYS Tax Update *Repeat of 1052* **Course 2011**	❑ IRS Criminal Investigation & ID Theft **Course 2012**	❑ Strategies To Build Retirement Income **Course 2013**	❑ Divorce Settlem. Not All Created Equal **Course 2014**	❑ How To Get Fined By The IRS **Course 2015**	❑ Financ. Statem. & Business Credit **Course 2016**	❑ Executive Brief On Healthcare Marketplace **Course 2017**
10:50 am- 12:30 pm	❑ Tax Aspects of Affordable Care Act **Course 2021**	❑ Retirement Plan Concepts & Strat. **Course 2022**	❑ Strategies To Protect Retirement Income **Course 2023**	❑ Compliation & Review Update **Course 2024**	❑ CT/NJ Tax Update **Course 2025**	❑ Top Technol. Trends & Apps – **Course 2026**	❑ NYS Tax Filing Trends & New Expand. Services **Course 2027**
12:30 pm - 1:30 pm LUNCH BREAK	❑ Ind. Contractor or Employee **Course 2031**	❑ Marketing Your Practice - Tech Savvy **Course 2032**	❑ Real-Life Estate Planning - Life Insurance **Course 2033**	❑ S-Corp Losses, Basis, Loans & – Debt Rules **Course 2034**	❑ Going Paperless What It Means **Course 2035**	❑ Just Lunch **Course 2036**	
1:35 pm- 3:15 pm	❑ 1040 Update Part 1 *Repeat of 1041* **Course 2041**	❑ Monitoring Life Insur. Policies In Trusts **Course 2042**	❑ Strateg. To Prevent Outliving Retiremnt Income **Course 2043**	❑ Cooperative & Condo Update **Course 2044**	❑ Favorite Special Needs Trusts **Course 2045**	❑ Future of M&A & Impact on Succession Strat. **Course 2046**	❑ NYC/NYS Tax Update **Course 2047**
3:35 pm- 5:15 pm	❑ 1040 Update Part 2 *Repeat of 1051* **Course 2051**	❑ Life Ins. Tax Traps To Avoid **Course 2052**	❑ Strat. For Transfer. Wealth **Course 2053**	❑ Succession Planning - Merger or Sale of Practice **Course 2054**	❑ ERISA Rules & 401K **Course 2055**	❑ Status of Same-Sex Marriage NY MEA **Course 2056**	❑ QuickBooks Accounting Product Update **Course 2057**
COCKTAIL PARTY FOR ALL PARTICIPANTS 5:15 - 7:00 pm – ON THE EXHIBIT FLOOR							
DAY 3	**SESSION 1**	**SESSION 2**	**SESSION 3**	**SESSION 4**	**SESSION 5**	**SESSION 6**	**SESSION 7**
7:50 am 8:40 am	Mandatory session for full day's credit	Course 3001 KEYNOTE SPEAKER: Mark Whitacre, Ph.D.					
8:55 am- 10:35 am	❑ Complete Tax Update for 2012 Part 1 **Course 3011**	❑ Basic Income Tax Refresher Part 1 **Course 3012**	❑ Fed. Schedule K-1 Issues For Tax Preparers **Course 3013**	❑ Tax Free Retirement **Course 3014**	❑ Tax Treatment of Long Term Care Insurance **Course 3015**	❑ Estate Planning In 2012 **Course 3016**	❑ Advising the College Bound Family **Course 3017**
10:50 am- 12:30 am	❑ Complete Tax Update for 2012 Part 2 **Course 3021**	❑ Basic Income Tax Refresher Part 2 **Course 3022**	❑ Marketing for Dummies - How To For Your Firm **Course 3023**	❑ Social Media To Enhance Your Marketing **Course 3024**	❑ Identity Theft: #1 Crime In USA **Course 3025**	❑ M&A - Hottest Trends In The Profession **Course 3026**	❑ Key Circular 230 Provisions To Know **Course 3027**
12:30 pm - 1:30 pm LUNCH BREAK	❑ Social Media & The Workplace **Course 3031**	❑ Smart Planning Strat. & New Reverse Mort. **Course 3032**	❑ Unleash The Power Of Your iPad **Course 3033**	❑ Healthcare Reform Tax **Course 3034**	❑ Just Lunch **Course 3035**		
1:35 pm- 3:15 pm	❑ Comp. Tax Update for 2011 Part 1 *Repeat of 3011* **Course 3041**	❑ Elder Care Advocacy & Medicaid Applic. **Course 3042**	❑ Tech-Savvy Client - Are You Ready? **Course 3043**	❑ Changes to Compilations & Reviews **Course 3044**	❑ Sales Tax Audits **Course 3045**	❑ Lacerte Program **Course 3046**	❑ Passive Activity Losses & Group. **Course 3047**
3:25 pm- 5:05 pm	❑ Comp. Tax Update for 2011 Part 2 *Repeat of 3021* **Course 3051**	❑ Application of Circular 230 & Other Standards **Course 3052**	❑ Business Val. Are Standards Different? **Course 3053**	❑ Statute Of Limitations **Course 3054**	❑ *TBA - See Web* **Course 3055**	❑ 5 Changes You Must Know - Insurance Indust. **Course 3056**	❑ S&C Corpor. Update **Course 3057**

NAME: ______________________________

2012 Long Island Tax Professionals Symposium

Registration Form

NOVEMBER 14, 15, 16, 2012

THREE EASY WAYS TO REGISTER (Questions? Please Call: 516-997-9500)

1) ONLINE: www.LITPS.org. *Online registration is CLOSED after 5pm, Friday, November 9.*
WE ENCOURAGE ONLINE REGISTRATION AS SESSIONS WILL FILL QUICKLY.

2) FAX* 516 997-5155

3) MAIL* Nassau/Suffolk Chapter, NCCPAP
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**** Add $45 Additional Registration Fee - (Except for online registration.)***

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Member	❑ $320 one day	❑ $640 two days	❑ **$790 three days***
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