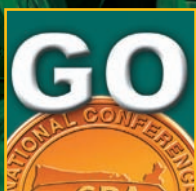


12th Annual LONG ISLAND TAX PROFESSIONALS SYMPOSIUM

SYMPOSIUM
NOVEMBER 19 • 20 • 21

EXHIBITS
NOVEMBER 19 • 20



See page 3 for
information about
our NEW NCCPAP Apps!

CREST HOLLOW COUNTRY CLUB • WOODBURY, NEW YORK

KEYNOTE SPEAKERS



November 19
Daniel D. Morris
CPA, Partner,
Morris + D'Angelo



Angie Grissom
President,
The Rainmaker
Companies



November 20
Thomas H. Mattox
Commissioner,
NYS Department of
Taxation & Finance



November 21
Joseph T. Conley III
Attorney-in-Charge,
Suffolk County
District Attorney
Tax Crimes Unit



Jacques Jiha, Ph.D.
Commissioner,
New York City
Department of Finance

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 Party, Wednesday

FRIDAY IS TECHNOLOGY DAY

Demonstrations, Exhibits and Meetings with Selected Technology Leaders

Welcome

to the 12th Annual Long Island Tax Professionals Symposium (LITPS). The Educational Foundation of the National Conference of CPA Practitioners – Nassau/Suffolk Chapter (NCCPAP) along with our co-sponsors invites you to participate in the largest gathering of tax professionals in the tri state area.

You will again have the opportunity to earn up to 30 CPE credits. The sessions will include updates on federal, local state and city tax laws, the Affordable Care Act, A & A, technical updates, strategies to accelerate revenue growth and so much more. Our popular lunch programs are back this year. You can expand your knowledge and waistline and receive CPE credits at the same time.

CASE RESOLUTION PROGRAMS

We also have our Case Resolutions Rooms. Both the IRS and NYS will have representatives to work with you on your clients' behalf. This is your perfect opportunity to resolve your clients' difficult issues. Bring your documents and most importantly your current Powers of Attorney. Get those nagging headaches off your desk.

Our popular Technology Day returns on Friday. Talk to the exhibitors that you deal with in your practice every day. It's much better than talking on the phone with them or trading emails. Learn about new products that may enhance your practice and give you more time for R and R.

NEW TECHNOLOGY

Speaking of technology, we have two new mobile NCCPAP apps. They're free and can be downloaded for both Apple and Android. GO.NCCPAP is everything NCCPAP. You can see your contacts, library, discussion groups, your communities and everything on the web-site. The second app is NEST-NCCPAP. This app is your companion at the show. You can view all class materials, see your schedule, verify your attendance, get maps, receive real time announcements, view pictures and tweet from your seat!

MORE

I would be remiss if I did not mention the passing of Samuel Dyckman (The best teacher that I ever had). Professor Dyckman was one of the most popular speakers at the Symposium since the beginning. In fact, he lectured at our all-day tax seminars for many years before the Symposium. Professor Dyckman was a friend to all of us, and it was he who suggested that we call him at his office with any questions. His enthusiasm, knowledge, kindness and friendship will be missed by all.

Special thanks goes out to our Executive Symposium Committee, chaired by Bob Goldfarb, celebrating his tenth anniversary as Chairman; we don't know how he does it, but we're grateful that he does. To all the other members of the Committee who generously give their time to make the Long Island Tax Professionals Symposium the leading event in the area - Ross Kass, Harold Ogulnick, Karen Giunta, Paula Sheppard, Ruthanne Corazzini, Andrea Parness, Carol Markman, Kathy Casey, Donald Ingram, Ken Hauptman, Stephen Sternlieb, Robert Barnett, Edward Caine, Barry Zalk, Mark Rosman and Gary Sanders (our Education Chairman).

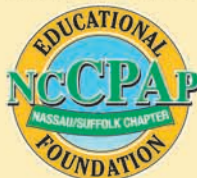
We thank them all for their combined efforts.

LOCATION

The 12th Annual Long Island Tax Professionals Symposium returns to the Crest Hollow Country Club, a professionally run and well designed facility, centrally located in Woodbury, NY.

Michael Rubinstein, CPA, President N/S Chapter of NCCPAP

PRIMARY SPONSOR



The Educational Foundation of The Nassau/Suffolk Chapter of the National Conference of CPA Practitioners

EDUCATIONAL PORTION OF LITPS IS CO-SPONSORED WITH THE IRS



Nassau/Suffolk Chapter NCCPAP • 22 Jericho Turnpike, Suite 110 • Mineola, New York 11501
516-997-9500 • LITS@LITaxSymposium.org • www.LITPS.org
Crest Hollow Country Club • 8325 Jericho Turnpike, Woodbury, New York 11797

2014 Long Island Tax Professionals Symposium

THE SEMINARS - Register Early

IRS representatives, NYS tax representatives, tax professionals and other subject matter experts will present all seminars. 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 2014 filing season, including the mandatory electronic filing in New York State.

All speakers are subject to change without notice.

Please note that seating is extremely limited.

Don't be left out – register early.

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

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

HOW TO REGISTER

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

Add \$45 to registration fee if faxed or emailed.

REGISTRATION FEES

Early registration prior to November 7

	1 Day	2 Day	3 Day
Members of Sponsoring Orgs.	\$365	\$730	\$790*
Non Members	\$415	\$830	\$950

Registration After November 6

Members of Sponsoring Orgs.	\$415	\$830	\$885*
Non Members	\$490	\$890	\$990

At the Door Fees

Members of Sponsoring Orgs.	\$465	\$925	\$1175
Non Members	\$515	\$995	\$1295

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

*Save \$100 on Multiple Registration

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

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. Please see details at litps.org. In order to receive your professional credit you must attend the courses for which you registered.

THE EXHIBITION FLOOR

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's 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. ID Theft cases and issues cannot be addressed. Authorized representatives are invited to pre-register one case.

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.

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 November 6, 2014. We regret that refunds are not available after that date. However, registrants will receive all appropriate course materials.

THE ELECTRONIC AGE...

SEMINAR MATERIALS ACCESS

All presentations will be available for downloading at www.litps.org by Monday, November 17. We suggest all attendees download at least their first day seminar course materials prior to arrival at Crest Hollow.

We have two new mobile NCCPAP apps. They're free and can be downloaded from GooglePlay or iTunes for both Apple and Android. Just type in "NCCPAP". GO.NCCPAP is everything NCCPAP. You can see your contacts, library, discussion groups, your communities and everything on the web-site. The second app is NEST-NCCPAP. This app is your companion at the show. You can view all class materials, see your schedule, verify your attendance, get maps, receive real time announcements, view pictures and tweet from your seat!

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.

CREST HOLLOW COUNTRY CLUB

Site of the 2014 LITPS

8325 Jericho Turnpike, Woodbury, NY 11797

516-692-8000, www.cresthollow.com

For directions see Crest Hollow Country Club's website

THE INN AT FOX HOLLOW

Special Hotel Rate Available

7755 Jericho Turnpike, Woodbury, Long Island, NY 11797

Phone: 1-800-291-8090, Direct: 516-224-8100

Fax: 516-224-8200, www.theinnatfoxhollow.com

See www.LITPS.org for details



**DAY ONE
SCHEDULE AT A GLANCE**

7:00 am to 7:45 amRegistration and Breakfast
 7:00 am to 7:00 pmExhibit Area Open
 8:00 am to 5:15 pmCase Resolution Room
 8:00 am to 10:30 amKeynote Speakers - **Mandatory Attendance for FULL Credit for the Day**
 10:35 am to 10:50 amMorning Break
 10:50 am to 12:30 pmConcurrent Sessions
 12:35 pm to 1:25 pmLunch
 1:35 pm to 3:15 pmConcurrent Sessions
 3:15 pm to 3:35 pmAfternoon Break & Exhibitor Raffles
 3:35 pm to 5:15 pmConcurrent Sessions
 5:15 pm to 7:00 pmCocktail Party

Course 1011
KEYNOTE (1 MAP, 2 TAX CPE)

You must attend this session for a full day's credit.

Daniel D. Morris

CPA, Partner, Morris + D'Angelo

Angie Grissom

President, The Rainmaker Companies

Course 1021
IDENTITY THEFT – WHO IS YOU TODAY? (SK CPE)

Armando D'Accordo, President, CMIT Solutions of South Nassau

Identity theft is the #1 reported crime in America, attend this session to learn how to avoid it happening to you. We will cover tactics that will help your personal identity, and your business confidential information as well. Don't wait until it's too late... Unless you don't mind having a new name and paying for other peoples goods and services.

Course: 1022
2014 LABOR AND EMPLOYMENT LAW UPDATES – LOTS OF CHANGES AND LOTS TO KNOW! (TAX CPE) (CLE)

Glenn J. Franklin, Esq. & Brian Klein, Esq.

This program will provide you with updates and new developments in wage and hour laws and discrimination laws, both local and federal. Specific topics will include the New York City Paid Sick Leave law, recent changes to the New York State unemployment insurance law, and severance agreements.

Course: 1023
THE LATEST RESIDENCY AUDIT RULES: WHAT YOU NEED TO KNOW (TAX CPE) (CLE)

Karen J. Tenenbaum, Esq., LL.M. (Taxation), CPA, Yvonne R. Cort., Esq., and Brad J. Polizzano, Esq., LL.M. (Taxation)

With recent changes to the law and updated guidelines, practitioners need to know how best to advise clients who are either currently undergoing a residency audit or may have one in the future. This informative interactive panel will explain these updates, as well as offer helpful practice tips related to domicile and statutory residency, including permanent place of abode and the 183 day rule.

If you ever had a client who owned multiple homes or a client who had a residency audit, you won't want to miss this session.

Course: 1024
WHAT'S NEW FOR ACCOUNTANTS FROM INTUIT (MAP CPE)

MB (Mary Beth) Raimondi, CPA, CITP, MS (TAX)

In this session, MaryBeth Raimondi will walk you through Intuit's latest releases for accounting professionals and their small business clients.

Course 1025
FINANCIAL STATEMENT FRAUD - WHAT WE SEE IN OUR FINANCIAL STATEMENTS; AND WHAT SHOULD WE SEE (A & A CPE)

Frank A. Gallo, CPA

We will review various financial statement frauds and misstatements and relate them to the accounting and auditing procedures we should be performing. We will review the procedures used to evaluate fraud, misstatements and errors. We will also review various real life situations and determine how they could have been avoided using the proper procedures.

Course: 1026
PLAN DESIGN FOR THE CLOSELY HELD BUSINESS (TAX CPE) (CFP-RP)

Stephen Abramson, CPC, CLU, ChFC

This session focuses on the common goal of small companies to design their retirement plans to provide maximum benefits for the owners and key employees with benefits to the rank and file that are necessary to satisfy the various nondiscrimination rules. We will consider the most basic plan design up to and including, creative plan design, two plan combinations; each of which focusing on a specific group of employees, and all the rules available to accomplish the stated goal above.

Course: 1027
DIVORCE DOESN'T HAVE TO BE TAXING (TAX CPE) (CFP-IC) (CLE)

Ivy H. Menchel, CFP®, CDFA™; Andrea Vacca, Esq.

Your clients are getting divorced and as their trusted advisor they turn to you for guidance...now what? This program will provide you with new and creative approaches to help minimize the financial and emotional impact on your clients and their businesses, and just as importantly, on you and your practice.

Course: 1031 Lunch Program
NCCPAP MEMBERSHIP HAS ITS PRIVILEGES (CPE is NOT available for this program)

Robert N. Brown, CPA and Sandra G. Johnson, CPA

This program will go over what the National Conference of CPA Practitioners (ncCPAP) as an organization has to offer. We will discuss how we as members help one another and our clients, as well as a host of valuable benefits that are available to our members. When you are a member of ncCPAP, you never have to work alone.

Course: 1032 Lunch Program
FOREIGN BANK ACCOUNTS AND FORM 8938 (1 TAX CPE) (CLE) (CE G1U2N-T-00074-14-I)

Robert S. Barnett, CPA, Esq.

The new Streamlined Procedures present opportunities for Clients to get current on their foreign reporting. This presentation will feature a discussion of the foreign reporting requirements from Thomas Bishop, Special Agent in Charge at IRS Criminal Investigation Division. Accountant's liability and Circular 230 requirements will be included.

Course: 1033 Lunch Program
CREATING A CULTURE OF OWNERSHIP IN
YOUR COMPANY (1SK CPE)

Randi Busse, Workforce Development Group, Inc.

Do your employees care about your business like you do? Are they thinking and acting like owners, or are they thinking and acting like "renters"? Attend this program to learn how to engage your employees which will translate into a better client experience.

Course: 1034 Lunch Program
BRANDING YOUR FIRM & MANAGING YOUR ONLINE PRESENCE WITH WEB BUILDER CS (1 MAP CPE)

Christina Wiseman, Product Manager, Thomson Reuters

Join us for lunch, and discussion about the Do's and Don'ts of websites for tax and accounting firms. Why you should have a website, why it shouldn't just be an electronic static billboard, what's its purpose (for prospects, for existing clients, for your firm), having a "website champion," and what options are available. Don't be paralyzed by the choices – get something up-to-date going, then continue to update it – your website should be a living, breathing extension of your firm!

Course: 1035 Lunch Program
NYS PRUDENT MANAGEMENT OF INSTITUTION FUNDS ACT (1 TAX CPE)

James Sheedan, Bureau Chief, NYS Office of the Attorney General, Charities Bureau

Please check the website for program details

Course: 1036 Lunch Program
PERSPECTIVES ON EMPLOYMENT LAW 2014 (1 TAX CPE) (1 CLE)

Judge Ruth B. Kraft

The presentation will focus on classification of employment status with respect to covered employment versus independent contractor status as well as exempt versus non-exempt standing. Comparison of Internal Revenue Code standards with New York State administrative interpretations will be undertaken together with an exposition of the burden of proof, applicable due process standards and audit preparation. Additionally, judicial interpretation of independent contractor agreements with respect to indicia of employment and their interpretation by the courts will be discussed.

Course: 1041
1040 UPDATE PART 1 (TAX CPE) (CE G1U2N-U-00002-12-O)

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 2014 Form 1040. In addition, there will be a discussion of the latest cases, rulings and regulations that affect the preparation of the 2014 Federal Income Tax Return.

Course: 1042
COST SEGREGATION & THE NEW TANGIBLE PROPERTY REGULATIONS (TAX CPE) (CLE)

Eric P. Christenson, Associate, Cost Segregation Services, Inc.

The new Tangible Property Regulations will have a tremendous **economical impact** on clients that own and improve commercial real estate. This presentation will help make Tax Professional aware of the issues and timelines that concern them and their clients. It will illustrate the importance of researching these issues, identifying impacted clients, and when applicable, partnering with a Cost Segregation Company to assist them in accurately performing asset valuation and cost segregation studies.

Course: 1043

COPING WITH TAX LEVIES, IRS LIENS & NYS WARRANTS (TAX CPE) (CLE)

Karen J. Tenenbaum, Esq., LL.M. (Taxation), CPA; Yvonne R. Cort., Esq.; and Brad J. Polizzano, Esq., LL.M. (Taxation)

When the IRS files a lien or NYS files a warrant, the effects can be more far reaching than the taxpayer realizes. IRS and NYS levies can completely disrupt the taxpayer's business or personal life and can cause serious damage to the taxpayer's finances – and even his or her reputation. Find out more about these tools and when the government implements them. The seminar will also discuss subordination, discharge, release and withdrawal of IRS liens, and similar remedies for NYS warrants.

Course: 1044

HOW TO GET AWAY WITHOUT A SERVER (MAP CPE)

Jim Filicetti, CPA

The time is now to discover “How to Get Away Without a Server”. Through Discovery, Planning, Implementation and Follow Through, we can together build a premier hosted workflow solution for you and your Tax & Accounting firm. Finally, tax and accounting software and secure client information the palm of your hand. We did it, now you can, too.

Course: 1045

ACCOUNTING & AUDITING UPDATE (A&A CPE)

Alexander K. Buchholz, CPA, MBA

Learn about recent and upcoming accounting and auditing developments. In this session, you will take a deeper dive into new and proposed accounting and auditing standards. Topics include proposed lease accounting and other important accounting standards; new revisions to the COSO framework; revisions to Circular OMB A-133 audits; recent standards from the PCC; proposed changes to the Independent Auditors' Report based on comments from the PCAOB.

Course: 1046

ASSET VS. STOCK SALE: A PRACTICAL WORKSHOP (TAX CPE) (CLE) (CE G1U2N-T-00075-14-I)

Renato D. Matos, Esq. & Robert Barnett, Esq., CPA

This lecture will provide a practical overview of the tax consequences to sellers and purchasers in asset versus stock sale transactions, including the effect of Section 338 elections on stock sales.

Course: 1047

THE AFFORDABLE CARE ACT AND EMPLOYER COMPLIANCE UPDATE (TAX CPE) (CE G1U2N-U-00076-14-I)

Keith Zuckerman, President, Professional Group Plans, Inc.

During the program, you will learn about the latest developments on health care reform and what you need to advise your clients on in regard to compliance of this law. Hear from the largest distributor of Health Insurance in the region on what they are advising their clients in regard to Healthcare and ERISA compliance.

Course: 1051

1040 UPDATE PART 2 (TAX CPE) (CFP) (CLE) (CE G1U2N-U-00003-12-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-ITP) (CLE)

Mark S. Klein, Esq.; William J. Comiskey, Esq.

New York has completely revamped its corporate tax scheme, and made significant changes to its estate tax. This seminar will cover these breaking developments, as well as new decisions, rulings, and administrative releases affecting New York's personal income and sales and use taxes. The impact of recent Tax Department enforcement initiatives will also be discussed.

Course: 1053

ELDER CARE ADVOCACY AND THE MEDICAID APPLICATION PROCESS (TAX CPE) (CLE)

Stuart H. Schoenfeld, Esq.

Applying for Medicaid benefits begins with an effective strategy to protect and preserve the family's resources. Using case studies, this program will highlight the intersection between tax planning and effective elder care plan design. We will examine the 2014 changes to New York estate tax laws and their impact on elder care planning as well as recent changes to Medicaid laws.

Course: 1054

M & A UPDATE: WHAT ARE THE TRENDS & HOW ARE FIRMS BEING VALUED IN 2014 AND BEYOND (TAX CPE)

Joel Sinkin, President Transition Advisors, LLC & William Carlino, Transition Advisors

If you are considering acquiring a firm, merging or a succession plan, this class is for you!

- What are the current marketplace trends
- Is it a buyer or seller's marketplace and will it remain the same?
- How are firms valuing practices
- What are the keys to retaining clients and more

Course 1055

NON-PROFIT REVITALIZATION ACT 2013 (TAX CPE)

James Sheehan, Bureau Chief, NYS Office of the Attorney General, Charities Bureau

Not-for-profits are the fastest growing type of business in New York, and state and local governments, and private entities, have a number of programs to assist these groups and to help them be successful. In the past year, state government has made major changes in agency governance under the Non-Profit Revitalization Act, and in the filing and reporting requirements for state grants qualification. These changes will require careful attention by accountants and auditors both to the new requirements and to preparation and review of annual audits, IRS-990s, and management letters in light of these requirements. This program, presented by the chief of the New York Charities Bureau, will give you the tools to help your clients and board members with their responsibilities, and highlight the resources available from the Bureau and elsewhere to assist.

Course 1056

WATCH THE Ps, Qs & Ss OF INSURANCE PLANNING (TAX CPE) (CLE) (CFP-IP)

Moderator: Robert Barnett, Esq., CPA

Speakers: James E. Meyer & Michael Greco, Greco Planning Group

What are the newer techniques in Insurance Planning? We will discuss: alternative to paying pre-

miums (Premium Finance), IRA Taxation (Pension Rescue), charitable gifting of insurance policies (Planned Giving), Qualified Grantor Trusts, an insurance tax update, and getting paid for existing policies (Senior Settlements).

Course: 1057

IRC SECTIONS 162(A) & 263(A): DEDUCTION AND CAPITALIZATION OF EXPENDITURES RELATED TO TANGIBLE PROPERTY (TAX CPE) (CE G1U2N-T-00089-14-I)

Scott K. Dinwiddie, IRS Special Counsel to the Associate Chief Counsel

After 10-years of development, final tangible property regulations are effective beginning in 2014. This presentation will summarize the guidance package and address significant changes, including the simplified de minimis safe harbor, the book conformity safe harbor for repair and maintenance costs, and the new rules regarding partial dispositions of tangible property, including the rules for general asset accounts.

**DAY TWO
SCHEDULE AT A GLANCE**

7:00 am to 7:45 pmRegistration and Breakfast

7:00 am to 5:15 pmExhibit Area Open

7:50 am to 8:40 amKeynote Speaker - **Mandatory Attendance for FULL Credit for the Day**

8:00 am to 5:00 pmCase Resolution Room

8:40 am to 8:55 amMorning Break

8:55 am to 10:35 amConcurrent Sessions

10:35 am to 10:50 amMorning Break

10:50 am to 12:30 pmConcurrent Sessions

12:35 pm to 1:25 pmLunch

1:35 pm to 3:15 pmConcurrent Sessions

3:15 pm to 3:35 pmAfternoon Break & Exhibitor Raffles

3:35 pm to 5:15 pmConcurrent Sessions

Course 2001

KEYNOTE (1 MAP, 2 TAX CPE)

You must attend this session for a full day's credit.

Thomas H. Mattox, Commissioner, NYS Department of Tax & 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

Course: 2012

SALES TAX AUDITS AND GENERAL AUDIT UPDATES (TAX CPE)

NYS Dept of Tax & Finance: Joseph Carzo, Director of Tax Audit Division and Frank Grillo, Section Head, LI Regional Office

Audit managers from the New York State Department of Taxation and Finance will discuss issues related to sales tax audits, including best practices and procedures that will result in efficient audits.

Course: 2013
MYTH BUSTERS, REALITY VS. PERCEPTION
(SK CPE) (CFP-INV)

Mark Badami, CFP® & John Baldi, PFS, CPA
 Want to learn more about the myths of Real Return vs. Average Returns on an investment portfolio? Interested in understanding and finding the tax savings in a Qualified Plan? Want to make sure that you can't out live your assets regardless of market performance? During this informative Myth Busting session, we will uncover and expose uncommon knowledge and destroy those hardwired, commonly misunderstood notions of today's retirement planning.

Course 2014
THE RETIREMENT JOURNEY
(SK CPE) (CFP-RP)

Audrey Kirwin, Financial Advisor/Park Ave Securities, Sound Wealth Financial Group
 Retirement planning is more than crunching numbers. Situations are often different for each person based up their financial habits & desired lifestyle. The importance of holistic financial guidance is imperative to coordinate assets & goals, and to avoid unexpected surprises. Whether they are in the financial accumulation or distribution phase, there are potential challenges, risks & strategies that need to be addressed & these will be reviewed. Issues with retirement income distribution & planning options will also be discussed.

Course: 2015
SSARS CLARITY PROJECT - COMPILATION
AND REVIEW PROCEDURES UNDER SSARS
NO. 21 (A & A CPE)

Frank A. Gallo, CPA
 We will review the new clarified and revised standards issued by Accounting and Review Services Committee (ARSC) for compilations and reviews engagements. We will discuss the new standards when the accountant is engaged to prepare financial statements but is not engaged to perform an audit, review or compilation on those financial statements. We will discuss the new wording required on compilation and review reports.

Course: 2016
STRATEGIES TO ACCELERATE REVENUE
GROWTH: DEVELOP THE TOOL, RESOURCES
AND MINDSET TO GROW YOUR BUSINESS
Paisley Demby, MBA Business Services Director, Goldman Sachs 10,000 Small Businesses Initiative operated at LaGuardia Community College
 Experience an actual class of the Goldman Sachs 10,000 Small Businesses Initiative. Learn impactful strategies to develop the mindset, tools and resources to accelerate growth within your business. Join the interactive discussion on what iconic CEOs have and use on a daily basis to develop strategies for successful business growth.

Course: 2017
IRS CRIMINAL INVESTIGATION AND IDENTITY
THEFT (TAX CPE) (CLE)
(CE G1U2N-T-00077-14-I)

Anthony Roberto Jr., IRS - Criminal Investigations; Supervisory Special Agent, Giovanni Lepore, IRS - Criminal Investigations, Special Agent
 An overview of IRS Criminal Investigation including; dis-

cussion on what Identity Theft is; how it is being used by criminals and what IRS-CI is doing about Identity Theft. This presentation will also include information on where to report Identity Theft and that the participants' clients need to do if they are victims of Identity Theft.

Course: 2021
REASONABLE COMPENSATION
(TAX CPE) (CLE) (CE G1U2N-T-00078-14-I)

Beanna J. Whitlock, EA CSA
 Every Federal Tax Classification from Sole Proprietors to S Corporations has issues with Reasonable Compensation. Participants will learn the pitfalls of clients who take too little or too much compensation and their role in reporting compensation on a tax return. Attendees will learn how to determine compensation, when it is proper to not take compensation and how the Internal Revenue Service is handling Reasonable Compensation.

Course: 2022
FIDUCIARY INCOME TAX: THE BASICS AND
BEYOND - PART 1 (TAX CPE) (CLE)
(CE G1U2N-T-00079-14-I)

Karen L. Goldberg, Principal, EisnerAmper LLP
 In this two part workshop, we will address the income tax treatment of trusts and estates, including the following:

- Different types of trusts and how they are taxed
- Distributions and their tax implications
- Charitable contributions and depreciation, depletion and amortization deductions
- Application of the passive activity rules
- Elections available to trusts and estates
- What happens when a trust or estate terminates
- Trusts and estates as eligible "S" corporation shareholders

This course continues at 2042

Course: 2023
WILL YOU RETIRE SUCCESSFULLY OR WORK
FOREVER? (TAX CPE) (CFP-RP)

Dr. H. William Wolfson
 Preparation is the key to a successful buy or sell of any practice. Often, CPAs are the "go to" experts for assistance, but what if that business is your own? Attend and learn financing options and proper planning needed to make these transitions successful.

Course: 2024
CT/NJ TAX UPDATE (TAX CPE) (CLE)

(CT) Louis B. Schatz, Esq. & (NJ) Alan J. Preis, CPA, P.C.
 Practitioners representing Connecticut and New Jersey clients will discuss significant recent legislative developments in their respective jurisdiction. In addition, the practitioners will provide a review of significant 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: 2025
NYC/NYS PROGRAM (TAX CPE)

Check website for details

Course: 2026
IT'S A DIGITAL WORLD (MAP CPE)

David Bergstein, CPA, CITP, CGMA
 This fast paced session will update attendees on why they should be thinking "apps," "mobile" & "workflow" instead of programs in their profession-

al and personal life. At the end of the session each attendee will be better equipped to help themselves and their clients in increasing productivity and profitability. It's no longer about compliance in the life of a CPA today, it's about reliance.

Course: 2027
OWNING LIFE INSURANCE INSIDE QUALIFIED
PLANS (TAX CPE) (CFP-RP)

Philip M. Herr, JD, CPA, PFS
 A unique and engaging presentation illustrates the concept of using life insurance in a Qualified Plan, essentially paying for the insurance with "tax deductible" dollars. At retirement, the extra cost "leverage" provides a major advantage to this strategy. Even at death asset shrinkage due to estate and income taxes can be achieved. We will cover the basics, who should consider it and various strategies

Course: 2031 Lunch Program
HOW TO READ A TRUST AND WILL FOR TAX
CONSIDERATIONS (1 TAX CPE) (1 CLE)

Gregory L. Matalon, Esq.
 Come and get the "legalese" dictionary and prepare an accurate 1041. Properly distinguish trust categories from the simple to the complex. Learn how to determine whether a trust is a grantor or a non-grantor trust and whether it is a simple or a complex trust. Panelists will discuss how tax apportionment can unknowingly shift the burden of paying the estate tax. In addition, panelists will discuss proper trust funding and the estate tax consequences.

Course: 2032 Lunch Program
NEGOTIATION: HOW TO GET WHAT YOU WANT
WITHOUT GIVING AWAY THE STORE (1 SK CPE)

Les Kule, Friendly Software, Inc.
 Negotiation is a critical part of life, we engage in negotiation all the time, in business, in society, and in our personal lives. Most people dread negotiation, believing it is a process where one side wins and one side loses. This does not have to be true – a successful negotiation results in a win/win situation.

This presentation will show you numerous ways to embrace the process with a better understanding of what negotiation really is, how it works, and how to work with the person on the other side of the table instead of against them. Many of the techniques conveyed can be put to use immediately, others will take some time and practice. Ultimately, when these skills are learned and used, quality of life will be better with less stress and more success.

Course: 2033 Lunch Program
EAT YOUR WAY TO A HEALTHIER WEB IMAGE
(1 MAP CPE)

Bob Torella, MBA
 Your web image is more important and more visible than ever. During this lunch program, we'll discuss 5 core (non-food) groups that are essential to your practice's overall web health including: your website, Google, social media, mobile, and regular web check-ups. Eating right and exercising are good too!

Course: 2034 Lunch Program
HOW TO MAXIMIZE CLIENT TAX DEDUCTIONS
IN A QUALIFIED PLAN WHILE MINIMIZING
TRUSTEE LIABILITIES (1 TAX CPE) (1 CFP-INV)

Louis C. Ciliberti, CFP, CLU, ChFC, Jim Zabbata, CFA
 A review of different plans available to business owners such as New Comp Profitability Profit Sharing Plans and Defined Benefit Plans that will allow max-

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imum contributions by the owners and key employees. Minimizing Trustee Liability topics include the need for an Investment Policy Statement, ensuring the plan is competitively priced and providing proper employee education programs.

Course: 2035 Lunch Program
REDUCING RISK: AVOIDING COMMON AUDIT TRIGGERS AND OTHER PITFALLS IN QUALIFIED RETIREMENT PLANS (1 TAX CPE)(1 CLE)
(CE G1U2N-Q-00081-14-I)

Todd E. Heller, Esq., CPC (Certified Pension Consultant), President of Heller Pension Associates, Inc.

Tax-qualified retirement plans are subject to many laws and regulations. Noncompliance can result in substantial penalties. This session will provide insight as to the most important issues that the IRS and DOL are currently investigating, and ways to decrease related risk.

Course: 2036 Lunch Program
REVENUE RECOGNITION (1 A & A CPE)

Joel Steinbert, McGladrey, LLP

Revenue is one of the most important financial statement measures. The long-awaited revised revenue recognition standard was issued by the FASB in May 2014. The new standard can have a significant impact on companies' revenue recognition policies, particularly for companies in certain industries. This session provides an overview of the standard, highlighting practical implications.

Course: 2037
JUST LUNCH

Course: 2041
1040 UPDATE PART 1 (TAX CPE) (CFP) (CLE)
(CE G1U2N-U-00002-12-O)

Robert Katz, J.D., LL.M., and Neil Katz, J.D., LL.M., CPA

This is a repeat of Course 1041

Course: 2042
FIDUCIARY INCOME TAX: THE BASICS AND BEYOND - PART 2 (TAX CPE) (CLE)
(CE G1U2N-T-00080-14-I)

Karen L. Goldberg, Principal, EisnerAmper LLP
This is a continuation of course 2022

Course: 2043
ADVANCED STRATEGIES THAT WILL PROTECT YOUR CLIENTS ASSETS –INCOME & ESTATE PLANNING STRATEGIES YOU NEED TO UNDERSTAND (TAX CPE) (CFP-ITP)

Frank Melia, CMPS, Moss Kaufman, CFP®, EA and Robin Burner-Daleo, Esq.

Your clientele have accumulated their wealth & now look to you for guidance on how to protect their assets from Estate taxation & Health Care costs. Learn how to implement strategies that will protect your clients' assets & help them sleep better at night. Our session will provide you with up to date advanced techniques regarding asset protection, life time income options, as well as strategies that provide liquidity to pay for the rising cost of Health Care.

Course: 2044
BRANDING YOUR PRACTICE AS A TECH-SAVVY FIRM (MAP CPE)

Christina Wiseman, Product Manager, Thomson Reuters

The tax and accounting profession is currently in the midst of technological upheaval, undergoing a number of paradigm shifts. Many clients have come to expect technology which as little as two years ago was only found in the most progressive, early adopting firms. As a result, there is significant opportunity for any firm to brand and position itself as savvy. Firms should embrace this new business model, adopt the technology which drives it, and pare down to a leaner tax workflow. Opportunities abound to both increase profit margins on existing client engagements, as well as offer new, more profitable advisory services alongside tax preparation – value-added offerings which can differentiate your firm in its market. Join us for an overview of the shift to updated technology, including a focus on mobile technology and devices, and the related strategies which you can start putting to work for your current clients today – and future clients tomorrow.

Course: 2045
UPDATE ON USES OF LIFE INSURANCE IN ESTATE PLANNING (TAX CPE) (CFP-EP)

Lee Slavutin, MD, CLU

During this program, we will address the following:

- Recent rulings on transfer for value
- Valuation of policies for gift tax purposes
- Term conversion opportunities and pitfalls
- MEC traps
- Utilizing Older Annuity and Insurance Products with High Guaranteed Interest Rates
- Impact of Financial Weakness of a Life Insurance Company on the Cost of Insurance
- Beneficiary Designation
- Key Man Life Insurance
- Selling a Policy from One Trust to Another
- Insurance as Part of a Split Dollar Agreement
- Private Placement Variable Life Insurance (PPVL)

Course: 2046
ARE LONG TERM CARE NEEDS CREATING A HOLE IN YOUR CLIENT'S TAX & ESTATE PLANNING? (TAX CPE) (CFP-IP)

Natalie Karp, MBA, CLTC, Rona Loshak, MBA, CLTC

Why it does NOT make sense to self-insure for long term care costs. THE TRUE COST of self-insuring is eye opening. The new landscape, legislation and tax incentives will be discussed. WE help clients protect their family's lifestyle, retirement, independence, family relationships and your practice liability.

Course: 2047
THE AFFORDABLE HEALTHCARE ACT – UPDATE (TAX CPE) (CE G1U2N-U-00082-14-I)

Beanna J. Whitlock, EA CSA

What we know, what we think we know, and what we have no clue about; the ACA of today. Participants will review the 2013 filing season with examples of how the .9 per cent Medicare Tax and the 3.8 Net Investment Income Tax affected their clients. Examples will be reviewed to determine how tax professionals must analyze the returns they prepare in order to assist their clients. The 2014 Individual Mandate will be examined with a focus on filing returns and how the tax professional must adjust their practices for this Tax Act. Finally, a brief forecast of the delayed Employer Mandate to assist in applying the ACA to applicable employers in 2015.

This course will repeat at 3025

Course: 2051
1040 UPDATE PART 2 (TAX CPE) (CFP) (CLE)
(CEG1U2N-U-00003-12-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
10 KEYS TO SUCCESSFUL FIRM MANAGEMENT (MAP CPE)

Michael Giardina, CEO, Office Tools Professional

We all need to constantly review how our firms are managed. One key to success is finding new ways to work more productively. To do that requires finding the right technology tools and best practices that meet the needs of the firm and its clients. When we find the right combination, increased profits, less stress and fewer hours worked lead to a greater work-life balance. All of this can be realized without sacrificing firm success or profit. Finding the methods and technologies that best fit an evolving firm's workflow is a huge part of the equation. Join us as we explore the 10 keys to a more productive and profitable firm.

Course: 2053
FINANCIAL PLANNING: AN ESSENTIAL TOOL FOR YOUR PRACTICE (CFP-FP)

Chris Danzer, Financial Advisor, & Shamir Hirsch, CFP®, MBA, CIMA

Learn how to provide the guidance your clients need to reach their financial goals and in the process fulfill your fiduciary responsibilities. We will discuss what financial planning entails; the pros and cons of doing it in house and how it can benefit your practice including adding an additional revenue stream.

Course: 2054
THE TRUTH ABOUT COMMERCIAL MORTGAGE FINANCING (SK CPE)

Moderator: Mike Minerva, SVP, Group Sales Executive, Capital One Bank

Panelists: Paul Krische, SVP, Market Credit Executive; Sue Kiesel, SVP, Market Credit Executive; Bridgette Neville, Senior Investment Real Estate Underwriter

Find out how banks analyze Commercial Mortgage requests so you can help your clients obtain the financing they need. Learn how banks view Owner-Occupied mortgages versus Investment Real Estate. You will also learn how to use SBA financing to reduce the down payment and lower monthly payments via extended amortizations. You will come away with a working knowledge that you can use to help your client prepare a complete package which will drive a timely and productive review with the bank. This program will include a detailed presentation, a hands-on exercise as well as an active panel discussion.

Course: 2055
MASTERING LACERTE: TOP TIME SAVING FEATURES & WHAT'S NEW (MAP CPE)

Jim Buffington, CPA

For experienced Lacerte users, this course teaches you how to put the power of Lacerte to work for you beyond the basics. Learn ins & out's of Lacerte's most popular time savings features and the tips & tricks hand picked from some of Intuit's longest term Lacerte customers. Plus get a preview from Intuit on what's coming down the pipeline for Tax Year 2014.

Course: 2056**NEW YORK CITY REAL PROPERTY TAX APPEALS (TAX CPE)***Eric W. Olson, Partner, Akerman LLP*

This program examines the New York City real property tax appeal process (aka "tax certiorari"), including review of the tax appeal calendar and procedure, Department of Finance notices, and Tax Commission forms. Applicable valuation methods and financial analysis techniques are discussed and presented, as well as special issues related to tax-exempt/abated and leased properties.

Course: 2057**EXECUTIVE BONUS ARRANGEMENT-WHAT THEY CAN MEAN FOR YOUR BUSINESS (TAX CPE)***Leslie Joy Larson, MS, LUTCF &**Ari Kirshenbaum, BS*

Explore the many issues facing the closely held business owner trying to attract and retain key employees. Among the topics covered are: how the executive bonus arrangement may assist the business owner reach their recruiting and retention goals for key employees; how attractive the executive benefit arrangement can be for the executive; and, how a restrictive agreement can give the employer more control over the benefit.

**DAY THREE
SCHEDULE AT A GLANCE**

6:45 am to 7:15 amRegistration and Breakfast
7:30 am to 3:30 pmTechnology Fair
7:15 am to 8:50 amKeynote Speaker
Mandatory Attendance for FULL Credit for the Day
8:00 am to 5:00 pmCase Resolution Room
8:50 am to 8:55 amMorning Break
8:55 am to 10:35 amConcurrent Sessions
10:35 am to 10:50 amMorning Break
10:50 am to 12:30 pmConcurrent Sessions
12:35 pm to 1:30 pmLunch
1:35 pm to 3:15 pmConcurrent Sessions
3:15 pm to 3:30 pmAfternoon Break & Exhibitor Raffles
3:35 pm to 5:15 pmConcurrent Sessions

Course: 3001**KEYNOTE SESSION**

You must attend this session for a full day's credit.

Jacques Jiha, Commissioner, New York City Department of Finance

Joseph T. Conley III, Attorney-in-Charge, Suffolk County District Attorney's Office Tax Crimes Unit.

Course: 3011**CURRENT TAX UPDATE (TAX CPE) (CFP) (CLE) (CE G1U2N-U-00083-14-I)***Robert S. Barnett, CPA, Esq.*

Current Tax Update includes a discussion of recent tax events, court opinions, cases and rulings. Multiple topics will be discussed including tax procedure, corporate, partnership, liens and levies, responsible person penalties, marital considerations, estate, passive activities and much more. Lots of fun for everyone is guaranteed.

Course: 3012**FEDERAL WAGE AND HOUR REQUIREMENTS FOR EMPLOYERS AND THEIR REPRESENTATIVES (TAX CPE) (CLE)***Irv Miljoner, District Director, U.S. DOL, Wage and Hour Division and Andrew Kimler, Esq.*

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: 3013**ESTATE PLANNING CASE STUDY – PART 1 (TAX CPE) (CFP-EP) (CLE)***Neil Katz, J.D., LL.M, CPA*

An interactive discussion, using case studies, to bring to light the latest estate planning techniques for estates under \$5 million. Of particular importance will be a review of credit-shelter and marital deduction planning, the use of portability and the new New York State Estate Tax rules.

Course: 3014**PARTNERSHIP AND 1031 EXCHANGE (TAX CPE) (CLE)***Mark E. Wilensky, Esq.*

This panel will explore methods of dividing real estate portfolios with minimal tax consequences and risk. Two principal fact patterns will be considered. The panel will address ways to minimize the risks associated with this transaction. The panel will also discuss several possibilities for navigating the disguised sale rules under section 707(a)(1) and the anti-mixing bowl rules of sections 704(c)(1)(b) and 737.

Course: 3015**SENIOR TAXPAYERS (TAX CPE)***Beanna J. Whitlock, EA CSA*

With over 10,000 Americans turning age 65 daily, the tax professionals' clientele is aging. Learn what tax professionals must do to assist their aging taxpayers to file complete and accurate tax returns. The session will concentrate on physical and emotional changes in the senior taxpayer and how the tax professional can protect themselves in service to this growing population of taxpayers.

Course: 3016**CONVERTING TO QUICKBOOKS ONLINE: WHAT TO EXPECT (MAP CPE)***MB (Mary Beth) Raimondi, CPA, CITP, MS (TAX)*

Once you are ready to convert from QuickBooks desktop to QuickBooks Online (QBO) you will want to make sure you follow the best practices. Discover what you should do prior to converting the file and what data is not converted to QBO. We will discuss what to do if the desktop file is messy or not suitable for conversion. Learn about the reports and data to verify after the conversion to verify the information was converted properly. Also, understand details about how to re-uploaded or 'do-over' the conversion when needed. Plus, we'll discuss tricky situations and common problems.

Course: 3017**AICPA ETHICS & IRS TAX PRACTICE RULES (2 CPE NYS ETHICS)***Gerard H. Schreiber, Jr., CPA*

This session will cover the AICPA Rules of Professional Conduct, AICPA Statements of Standards for Tax Services and Circular 230. Practitioners will be able to identify the similarities and differences between these ethical rules and how they affect their day to day practice.

Course: 3021**S&C CORPORATION UPDATE (TAX CPE) (CFP) (CLE) (CE G1U2N-U-00084-14-I)***Robert S. Barnett, CPA, Esq.*

This lecture will include discussion of: New cases and revenue procedures; Debt tracing rules; Compensation; Management Fees, loss utilization and basis computations. Passive activities, Net investment income and the 3.8% surtax will also be included.

Course: 3022**THE MOBILE FIRM (MAP CPE)***Christina Wiseman, Product Manager, Thomson Reuters*

With the prevalence of smartphones, tablets, and Internet access from anywhere, we know mobile technology is quickly changing how we operate and interact with each other. But what does the mobile revolution mean for the accounting firm – and how can you make mobile work for your firm? Fortunately, there are a variety of timesaving tools that can help firms take advantage of mobile conveniences while maintaining tight security on client data. In this session, we'll discuss some of the technology that will help your firm go mobile.

Course: 3023**ESTATE PLANNING CASE STUDY – ADVANCED (TAX CPE) (CFP-EP) (CLE)***Neil Katz, J.D., LL.M, CPA*

An interactive discussion, using case studies, to bring to light the latest estate planning techniques for estates in excess of \$5 million. Of particular importance will be a review of the use of trusts in estate planning for lifetime gift transfers, including QPRTs, GRATs and Grantor Trusts. In addition, the session will highlight important issues in Generation Skipping planning and the use of Charitable Planning for large estates.

Course: 3024**IRS PRACTICE & PROCEDURES ISSUES (TAX CPE) (CE G1U2N-T-00085-14-I)***Melanie Lauridsen & Gerard H. Schreiber, Jr., CPA*

This session will cover the AICPA Legislative and Advocacy initiatives, and IRS Practice issues that affect every day tax practice including the Internal Revenue Manual, correspondence audits, penalty relief, and IRS refund freezes. Insight will be provided to assist practitioners in maneuvering thru the IRS with client matters.

Course: 3025**THE AFFORDABLE HEALTHCARE ACT – UPDATE (TAX CPE) (CE G1U2N-U-00082-14-I)***Beanna J. Whitlock, EA CSA**This is a repeat of Course 2047*

Course: 3026

WHAT DO WE DO? OUR CLIENT IS FILING FOR BANKRUPTCY: INSIGHT INTO THE INTIMATE RELATIONSHIP BETWEEN CPAS, ATTORNEYS, AND INSOLVENT DEBTORS (TAX CPE) (CLE)

Robert Spence, Esq., Spence Law Office, P.C

This informative program will provide you with what you need to know regarding your role and responsibilities as the debtor's accountant.

Course: 3027

WHAT TO EXPECT WHEN YOU ARE EXPECTING: A SALES TAX ASSESSMENT (TAX CPE)

Mark L. Stone, CPA

Many Clients are unable to pay either their sales tax due on their returns or a bill from an audit. This seminar will cover the options available to resolve a sales tax assessment and provide a warning for the types of collection actions the government may take.

Course: 3031 Lunch Program

WHY IS THE NET INVESTMENT INCOME TAX SO COMPLICATED? (1 TAX CPE)

David H. Kirk, Ernst & Young LLP

An insider's retrospective on the 3-year development of the NII regime and lessons learned from the inaugural filing season.

Course: 3037

JUST LUNCH

Course: 3041

CURRENT TAX UPDATE (TAX CPE) (CFP) (CLE) (CE G1U2N-U-00083-14-I)

Robert S. Barnett, CPA, Esq.

This is a Repeat of Course 3011

Course: 3042

WHAT EVERY ADVISOR NEEDS TO KNOW ABOUT SPECIAL NEEDS PLANNING (TAX CPE) (CLE)

Vincent J. Russo, Esq.

Vincent J. Russo will draw on his personal and client experiences to provide a practical approach to Special Needs Planning. He will provide an overview of what special needs is all about while highlighting key areas such as Government Benefits (SSI & Medicaid), Special Needs Trusts, Taxes and Guardianships.

Course: 3043

LESSONS FROM WORKING FOR AND AGAINST THE IRS (TAX CPE)

Lance S. Hall, ASA, President, FMV Opinions, Inc.

With estate and gift tax audits skyrocketing, coupled with an increasingly aggressive IRS, you will want to hear a national valuation authority discuss this disturbing trend. In this dynamic, entertaining and highly informative presentation, we will explore the issues and provide practical advice on preparing for, and successfully dealing with, the IRS in audits.

Course: 3044

INTERNATIONAL TAXATION: FOREIGN TAX CREDITS (TAX CPE) (CLE)

(CE G1U2N-T-00086-14-I)

Renato D. Matos, Esq.

The emphasis of this lecture will be on developing an understanding of the intricacies of the foreign tax credit system (including the rules related to eligibility and creditable taxes, the section 904 limitation, the

deemed-paid credit, and the potential for planning), the allocation of interest and other expenses and the treatment of overseas losses.

Course: 3045

SMARTER SOCIAL SECURITY - STRATEGIES TO MAXIMIZE SPOUSAL BENEFITS (SK CPE) (CFP RP)

Daniel G. Mazzola, CFA, CPA

A broad overview of the Social Security program as it relates to retirees and their beneficiaries while emphasizing spousal benefits. An AARP survey conducted in 2012 determined that only half of the respondents who were either married or who had ever been married were aware that spousal benefits were available. Spousal benefits will be examined and we will explore how married couples can optimize their collective payouts using two simple strategies.

Course: 3046

READING A HEDGE FUND K-1 (TAX CPE) (CE G1U2N-T-00087-14-I)

Barry L. Sunshine, CPA, MS

When your client invests in a hedge fund and provides to you the annual K-1, many preparers do not fully understand all of the tax implications for the reporting purposes. This program will review what you as the tax preparer needs to understand and do.

Course: 3047

EFFECTIVE USE OF IRA TRUSTS AFTER THE U.S. SUPREME COURT DECISION IN CLARK V. RAMEKER (TAX CPE) (CLE)

Seymour Goldberg, CPA, MBA, JD

This program takes on additional significance in light of the June 12, 2014 U.S. Supreme Court decision holding that inherited IRAs are not "retirement funds" and are, therefore, not exempt assets under the bankruptcy code.

Program Topics Include: Effective Use of IRA Trusts in Estate Planning and Asset Protection Planning, Common Errors in Retirement Distribution Planning, Who Should Pay Your Estate Tax on Your Estate Tax on Your Retirement Accounts, New Circular 230 provision regarding "Competence" effective June 12, 2014 and Liability of tax return preparer under Circular 230 for improperly preparing a fiduciary income tax trust return of a noncompliant IRA trust.

Course: 3051

S&C CORPORATION UPDATE (TAX CPE) (CFP) (CLE) (CE G1U2N-U-00084-14-I)

Robert S. Barnett, CPA, Esq.

This is a Repeat of Course 3021.

Course: 3052

INTERNATIONAL TAX - FIXING THE PAST - PLANNING THE FUTURE (TAX CPE) (CE G1U2N-T-00088-14-I)

Eric L. Morgenthal, Esq., CPA, M.S (Tax)

Learn the latest about IRS Offshore Voluntary Disclosure options including streamlined disclosures, "opt-out" mechanics, procedures, and issues relating to examination, negotiation, settlement and appeals. Collection measures, penalty abatement, Statutes of Limitations, defenses and criminal exposure will be discussed. Learn the risks and duties for the CPA along with an overview of the Exit Tax and a roadmap of commonly overlooked International Tax filing obligations.

Course: 3053

BUY-SELL AGREEMENTS CONSIDERATIONS INCLUDING A DISCUSSION OF 101(A) AND 101(J) (TAX CPE) (CLE)

Renato D. Matos, Esq.

Buy-Sell Agreements are an important tool for your clients to effectively manage their business interests and head off estate and business continuation issues before they occur. Find out how Buy-Sells and Shareholder / Partnership Agreements can be used to protect years of hard work and smoothly settle succession considerations. This course will cover Tax & Financial Considerations; Avoiding Disputes and Traps; Funding Options & Opportunities; and Pension Considerations & Seasoned Money. Good advice makes all the difference.

Course: 3054

THE INSIDERS TRUTH ABOUT HOW TO DO A SUCCESSFUL MERGER ON LONG ISLAND (TAX CPE) (CLE)

Max T. Krotman, Esq.

Three of your colleagues who have successfully merged their practices with Long Island CPA firms, will tell you the inside on what really happens to clients, staff, earnings, and most of all the control (or lack of control) and professional enjoyment that results from a successful merger.

Course: 3055

CYBER LIABILITY DECODED

Joe Gates, Beazley Group

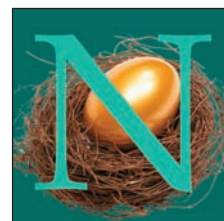
If you have employees or customers (and who doesn't) then you have a Cyber Liability exposure. Cyber Liability Decoded is a presentation that explains a data breach including the exposure, the applicable laws and the potential expenses as well as the insurance products available to protect your business.

Course: 3056

LEARN HOW TO HELP YOUR CLIENTS BENEFIT FROM THE NEW TANGIBLE PROPERTY REGULATIONS (TAX CPE)

Chris Hitselberger, Managing Director, SourceHOV Tax

This course covers the details of when and how to 'Expense' a repair, 'Capitalize' an improvement or 'Write-off' an abandoned asset. If your clients are depreciating building or improvement costs, you will find this program very informative and useful.



2014 Long Island Tax Professionals Symposium

NOVEMBER 19, 20, 21, 2014

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

1) ONLINE: www.LITPS.org. **Online registration is CLOSED after 5pm, Friday, November 14.**

WE ENCOURAGE ONLINE REGISTRATION AS SESSIONS WILL FILL QUICKLY.

2) FAX* 516 997-5155

3) MAIL* Nassau/Suffolk Chapter, nCCPA
22 Jericho Turnpike, Suite 110, Mineola NY 11501

* Add \$45 Additional Registration Fee - (Except for online registration.)

Before registering, be sure to visit www.LITPS.org for program updates. Please be sure to include page 11 with your seminar selections.

REGISTRATION INFORMATION (One registration form per attendee, please duplicate this form as necessary)

Name _____ Phone _____ Fax _____

Company Name _____

Mailing Address _____

E-mail Address _____

Member ID # _____ State Lic. # _____

Member of (check all that apply) nCCPA FPA NATP NYSSEA NYSIA NYSSCPA

IRS NAL ADFP

Annual dues must be current to receive member price.

By submitting this registration form, I agree to the terms and conditions set forth within the registration booklet.

CONFERENCE FEES (Includes: Continental Breakfast and Full Lunch)

BEFORE NOVEMBER 7, 2014

Member	<input type="checkbox"/> \$365 one day	<input type="checkbox"/> \$730 two days	<input type="checkbox"/> \$790 three days*
Non-Member	<input type="checkbox"/> \$415 one day	<input type="checkbox"/> \$830 two days	<input type="checkbox"/> \$950 three days

AFTER NOVEMBER 6, 2014

Member	<input type="checkbox"/> \$415 one day	<input type="checkbox"/> \$830 two days	<input type="checkbox"/> \$885 three days*
Non-Member	<input type="checkbox"/> \$490 one day	<input type="checkbox"/> \$890 two days	<input type="checkbox"/> \$990 three days

DAILY FEE AT THE DOOR

Members	\$465 one day	\$925 two days	\$1175 three days
Non-Members	\$515 one day	\$995 two days	\$1295 three days

* **SAVE \$100!** Registrants over two per same firm and members of a LITPS Sponsoring Organization may deduct \$100 from their three day registration fee. See page 3 for details.

REQUESTING APPOINTMENT WITH IRS REPRESENTATIVE

REQUESTING APPOINTMENT WITH NYS TAX REPRESENTATIVE

I am applying for CLE credit(s)

Additional fee of **\$25 per credit** x No. of credits: _____ = Total \$ _____

PAYMENT INFORMATION

Check enclosed for \$ _____ payable to: Educational Foundation of Nassau/Suffolk Chapter of nCCPA

Please bill my credit card for \$ _____ Credit Card MasterCard Visa Amex

Card No. _____ Exp. Date _____

Name on Credit Card _____

Billing Address _____ State _____ ZIP _____

Signature _____ Date _____

SPECIAL DIETARY NEEDS _____

2014 Long Island Tax Professionals Symposium

Check out your selections prior to registering on the website LITPS.org

Schedule at a Glance

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 9:30 - 10:30 AM	DANIEL D. MORRIS ANGIE GRISSOM	Before registering, be sure to visit www.LITPS.org for any updates or modifications to the program		
10:50 am - 12:30 pm	<input type="checkbox"/> Identity Theft Course 1021	<input type="checkbox"/> 2014 Labor & Employment Law Updates Course 1022	<input type="checkbox"/> Latest Residency Audit Rules Course 1023	<input type="checkbox"/> Intuit Program What's New For Accountants Course 1024	<input type="checkbox"/> Financial Statement Fraud Course 1025	<input type="checkbox"/> Plan Design for Closely Held Business Course 1026	<input type="checkbox"/> Divorce Doesn't Have To Be Taxing Course 1027
12:35 pm - 1:25 pm LUNCH BREAK	<input type="checkbox"/> nCCPA Membership Course 1031	<input type="checkbox"/> Foreign Bank Accounts Course 1032	<input type="checkbox"/> Creating A Culture of Ownership Course 1033	<input type="checkbox"/> Branding Your Firm/Online Presence Course 1034	<input type="checkbox"/> NYS Mgmt of Institutional Funds Course 1035	<input type="checkbox"/> Perspectives On Employment Law Course 1036	<input type="checkbox"/> Just Lunch Course 1037
1:35 pm - 3:15 pm	<input type="checkbox"/> 1040 Update Part 1 Course 1041	<input type="checkbox"/> Cost Segregation Course 1042	<input type="checkbox"/> Coping With Tax Levies Course 1043	<input type="checkbox"/> How to Get Away w/o a Server Course 1044	<input type="checkbox"/> Accounting & Auditing Update Course 1045	<input type="checkbox"/> Asset vs Stock Sale Course 1046	<input type="checkbox"/> Afford. Care Act Employer Compl. Course 1047
3:35 pm - 5:15 pm	<input type="checkbox"/> 1040 Update Part 2 Course 1051	<input type="checkbox"/> NY Tax Update Course 1052	<input type="checkbox"/> Elder Care & Medicaid Course 1053	<input type="checkbox"/> M&A Update: What Are Trends Course 1054	<input type="checkbox"/> Non-Profit Revitalization Course 1055	<input type="checkbox"/> Ps, Qs & Ss Insurance Plan Course 1056	<input type="checkbox"/> IRC Sections 162(A) & 263(A) 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: Thomas H. Mattox, Commissioner, NYS Dept. of Tax & Finance				
8:55 am - 10:35 am	<input type="checkbox"/> NY Tax Update Repeat of 1052 Course 2011	<input type="checkbox"/> Sales Tax & General Audit Updates Course 2012	<input type="checkbox"/> Myth Busters Reality vs Percep. Course 2013	<input type="checkbox"/> The Retirement Journey Course 2014	<input type="checkbox"/> SSARS Clarity Project Course 2015	<input type="checkbox"/> Strat. to Accel. Revenue Growth Course 2016	<input type="checkbox"/> IRS Criminal Inv. Identity Theft Course 2017
10:50 am - 12:30 pm	<input type="checkbox"/> Reasonable Compensation Course 2021	<input type="checkbox"/> Fiduciary Income Tax: Basics + (Part 1) Course 2022	<input type="checkbox"/> Will You Retire Successfully? Course 2023	<input type="checkbox"/> CT/NJ Tax Update Course 2024	<input type="checkbox"/> NYC/NYS Program (See litps.org) Course 2025	<input type="checkbox"/> It's A Digital World Course 2026	<input type="checkbox"/> Owning Life Ins. Inside Qualified Plans Course 2027
12:35 pm - 1:25 pm LUNCH BREAK	<input type="checkbox"/> How to Read a Trust/Will for Tax Considerations Course 2031	<input type="checkbox"/> Negotiation: How To Get What You Want Course 2032	<input type="checkbox"/> Eat Your Way To A Healthy Web Image Course 2033	<input type="checkbox"/> Max. Client Tax Deductions Course 2034	<input type="checkbox"/> Reducing Risk: Audit Triggers of Retirement Plans Course 2035	<input type="checkbox"/> Revenue Recognition Course 2036	<input type="checkbox"/> Just Lunch Course 2037
1:35 pm - 3:15 pm	<input type="checkbox"/> 1040 Update (Part 1) Repeat of 1041 Course 2041	<input type="checkbox"/> Fiduciary Income Tax: Basics + (Part 2) Course 2042	<input type="checkbox"/> Adv. Strategies to Protect Client Assets Course 2043	<input type="checkbox"/> Branding Your Practice as Tech Savvy Course 2044	<input type="checkbox"/> Update on Uses of Life Insurance in Estate Planning Course 2045	<input type="checkbox"/> Long Term Care Needs – Tax & Estate Plan. Course 2046	<input type="checkbox"/> Afford. Healthcare Act Update Course 2047
3:35 pm - 5:15 pm	<input type="checkbox"/> 1040 Update (Part 2) Repeat of 1051 Course 2051	<input type="checkbox"/> 10 Keys to Success. Firm Management Course 2052	<input type="checkbox"/> Financial Planning: Essential Tool Course 2053	<input type="checkbox"/> Truth About Commercial Mortgage Finance Course 2054	<input type="checkbox"/> Mastering Lacerte Course 2055	<input type="checkbox"/> NYC Real Property Tax Appeals Course 2056	<input type="checkbox"/> Executive Bonus Arrangement Course 2057
DAY 3	SESSION 1	SESSION 2	SESSION 3	SESSION 4	SESSION 5	SESSION 6	SESSION 7
7:15 am - 8:50 am	Mandatory session for full day's credit	Course 3001	KEYNOTE SPEAKER: Jacques Jiha, Commissioner NYC Dept. of Tax & Finance Joseph T. Conley III, Attorney-In-Charge, Suffolk County DA's Tax Crimes Unit				
8:55 am - 10:35 am	<input type="checkbox"/> Current Tax Update Course 3011	<input type="checkbox"/> Fed. Wage & Hour Requirements for Employers & Reps Course 3012	<input type="checkbox"/> Estate Planning Case Study (Part 1) Course 3013	<input type="checkbox"/> Partnership & 1031 Exchange Course 3014	<input type="checkbox"/> Senior Tax Payers Course 3015	<input type="checkbox"/> Converting to QuickBooks Online Course 3016	<input type="checkbox"/> AICPA Ethics & IRS Tax Practice Rules Course 3017
10:50 am - 12:30 pm	<input type="checkbox"/> S&C Corporation Update Course 3021	<input type="checkbox"/> The Mobile Firm Course 3022	<input type="checkbox"/> Estate Planning Case Study - Advanced Course 3023	<input type="checkbox"/> IRS Practice & Procedures Course 3024	<input type="checkbox"/> Afford. Healthcare Act Update Repeat of 2047 Course 3025	<input type="checkbox"/> Our Client Is Filing for Bankruptcy Course 3026	<input type="checkbox"/> Sales Tax Assessment Course 3027
12:35 pm - 1:30 pm LUNCH BREAK	<input type="checkbox"/> Why Is Net Investment Income Tax Complicated? Course 3031						<input type="checkbox"/> Just Lunch Course 3037
1:35 pm - 3:15 pm	<input type="checkbox"/> Current Tax Update Repeat of 3011 Course 3041	<input type="checkbox"/> What Every Advisor Needs To Know About Special Needs Plan. Course 3042	<input type="checkbox"/> Lessons From Working For & Against The IRS Course 3043	<input type="checkbox"/> International Taxation Course 3044	<input type="checkbox"/> Smarter Social Security - Max. Spousal Benefits Course 3045	<input type="checkbox"/> Reading A Hedge Fund K-1 Course 3046	<input type="checkbox"/> Effective Use of IRA Trusts Course 3047
3:35 pm - 5:15 pm	<input type="checkbox"/> S&C Corp Update Repeat of 3021 Course 3051	<input type="checkbox"/> Intl Tax - Fixing Past - Planning Future Course 3052	<input type="checkbox"/> Buy-Sell Agreements Considerations Course 3053	<input type="checkbox"/> How To Do A Successful Merger On LI Course 3054	<input type="checkbox"/> Cyber Liability Decoded Course 3055	<input type="checkbox"/> Help Your Clients Benefit From New Tangible Prop. Reg. Course 3056	

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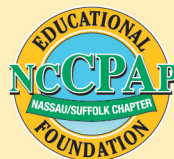
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