

Tri-State Taxation Conference

Gain New Planning Ideas for the Coming Filing Season

Tuesday, January 28, 2014

The Princeton Club

New York City

Also Available via Live Webcast



Keynote Address:

“The view from the Taxpayer Rights Advocate’s Office”

Camille Siano Enders,
Deputy Commissioner
and Taxpayer Rights
Advocate, *New York
State Department of
Taxation and Finance*

A unique opportunity to hear from and question the tax commissioners:

- New York State Department of Taxation and Finance
- Connecticut Department of Revenue Services
- New Jersey Division of Taxation
- New York City Department of Finance



See Inside for Details

Register Today!

Visit www.nysscpa.org/tristate14 or call 800-537-3635

Tri-State Taxation Conference

Gain New Planning Ideas for the Coming Filing Season

A unique opportunity to question the tax commissioners of New York State, New York City, New Jersey, and Connecticut

Conference Program

8:15–8:50 a.m.

Check-in, Continental Breakfast, and Networking

8:50–9:00 a.m.

Introduction

Committee Chair:

Jeffrey S. Gold, CPA, Tax Director, LM Cohen & Co.

Conference Chair:

Alan J. Preis, CPA, MBA, Own Account

9:00–10:30 a.m.

Technical Updates and Planning Ideas for the 2014 Tax Filing Season

- Barry H. Horowitz, CPA, MST, Partner, *EisnerLubin llp Division of WithumSmith+Brown, PC (New York City)*
- Alan J. Preis, CPA, MBA, Own Account (New Jersey)
- Louis B. Schatz, Esq., Partner, *Shipman & Goodwin LLP (Connecticut)*
- Mark Levin, CPA, Own Account/Adjunct Professor, *York College (Queens, N.Y.)*

Receive an overview of critical developments in tax legislation from each jurisdiction, including new cases, rulings, and administrative developments. Additionally, you'll get new planning ideas for the upcoming filing season from top experts in each taxing authority.

10:30–10:45 a.m.

Break

10:45 a.m.–12:15 p.m.

Technical Updates and Planning Ideas for the 2014 Tax Filing Season *(continued)*

12:15–1:05 p.m.

Luncheon

1:05–1:45 p.m.

Keynote Address

Camille Siano Enders, Deputy Commissioner and Taxpayer Rights Advocate, *New York State Department of Taxation and Finance*

The New York State Taxpayer Rights Advocate will share her experiences and perspective on the progress the office has made and how practitioners and the Department can best resolve pressing and difficult issues.

1:45–5:00 p.m.

Practitioner Dialogue with Tax Officials

Hear in-depth discussions by tax officials from New York State, New York City, New Jersey, and Connecticut, as they review the latest laws and regulations affecting taxpayers in their jurisdictions. Their practitioner counterparts will examine the impact of these developments on your clients and their planning strategies.



1:45–2:30 p.m.

New York State

Official: Thomas H. Mattox, Commissioner, *New York State Department of Taxation and Finance*

Practitioner: Mark Levin, CPA, Own Account/Adjunct Professor, *York College (Queens, N.Y.)*



2:30–3:15 p.m.

Connecticut

Official: Kevin B. Sullivan, JD, Commissioner, *Connecticut Department of Revenue Services*

Practitioner: Louis Schatz, Esq., *Shipman & Goodwin, LLP (Hartford, Conn.)*

3:15–3:30 p.m.

Break



3:30–4:15 p.m.

New Jersey

Official: Michael J. Bryan, CPA, Director, *New Jersey Division of Taxation*

Practitioner: Alan J. Preis, CPA, MBA, Own Account



4:15–5:00 p.m.

New York City

Official: Michael Hyman, Deputy Commissioner Tax Policy & Planning, *New York City Department of Finance*

Practitioner: Barry H. Horowitz, CPA, MST, Partner, *EisnerLubin llp Division of WithumSmith+Brown, PC*

5:00–5:05 p.m.

Closing Remarks

Agenda and speakers are subject to change. For the latest updates, including full speaker bios, visit www.nysscpa.org/tristate14.



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How to Register for the Conference:

Online at www.nysscpa.org/tristate14

By phone at (212) 719-8383 or (800) 537-3635

Fill out the registration form on the back panel and mail back to us

Or Fax the registration form to (866) 495-1354

How to Register for the Live Webcast:

Online at www.nysscpa.org/e-cpe

By phone at (877) 880-1335

Registration Information: All registrations must be received 14 days prior to the event in order to guarantee a seat and course materials. Allow approximately 14 days for your return confirmation. Registrants who do not receive their e-mailed confirmation before the conference must call FAE Registration to confirm registration status. Individuals who have not registered before the 14-day cutoff must call to determine space availability. Advance paid registrants will be seated first. For space availability and registration information, call FAE Registration during business hours.

Program Details: Tuesday, January 28, 2014. Program begins at 8:15 a.m. and ends at 5:05 p.m. (Check-in begins at 7:45 a.m.)

Payment Information: Payment may be made by check or may be charged to American Express, MasterCard, Visa, or Discover. Credit card information must accompany all fax, phone, and online registrations.

Special Requirements: Participants with special requirements should notify FAE staff at least 14 days in advance of the program.

Refunds: No refunds will be given for cancellations received less than 14 days prior to the program date. A \$50 processing fee will be deducted from refunds for cancellations received more than 14 days prior to the program date.

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Walk-ins: All individuals who register on the day of the program will be charged an additional \$25 fee. As walk-ins, if the event is a FAE Paperless Event, please be advised that you will be e-mailed a link to the materials within five days after the program. Upon receipt of the link, please ensure that you download and save the course materials immediately. **Materials will NOT be provided on-site.**

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This is a paperless event. Course materials will be available in electronic PDF format only. Within five days of the event, you will be e-mailed a link to your online events hosting account. From there, you may download the program materials for the upcoming event, then choose to save the file(s) to your computer or print them out.

The FAE is a registered CPE Sponsor in these states with the following sponsor numbers:



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Alan J. Preis, CPA, MBA

Letter from the Chair

Dear Colleagues:

Each year the state and multistate tax implications to our companies and clients become more challenging. Please join us at the Tri-State Taxation Conference to hear leading practitioners explain the latest developments in each jurisdiction, including

- Law changes
- New regulations and rulings
- Audit initiatives
- Court cases in New York State, New York City, Connecticut, and New Jersey

You will also hear from the tax commissioners of each jurisdiction who will explain the latest trends in tax administration and enforcement.

As an attendee at the Tri-State Taxation Conference, you will have the unique opportunity to pose questions to the state tax officials and the practitioner presenters. Plan to attend this year and find out why so many of your colleagues choose to come back each year.

Sincerely,

Alan J. Preis, CPA, MBA, Tri-State Taxation Conference Chair

PS: Hear directly from the Tax Commissioners and leading practitioners about the coming tax season.

Register today at www.nysscpa.org/tristate14.

Who Should Attend? CPAs and other tax professionals with corporate, partnership, and individual clients in the tri-state area.

Why You Should Attend: To become familiar with recent court decisions, legislative and administrative developments, filing requirements, and tax planning opportunities for clients in New York State, New York City, New Jersey, and Connecticut.

Program Details:

Time: 8:50 a.m.–5:05 p.m. (Check-in begins at 8:15 a.m.)

Sponsoring Committee: New York, Multistate and Local Taxation Committee, *NYSSCPA*

Sponsoring Committee Chair: Jeffrey S. Gold, CPA, Tax Director, *LM Cohen & Co.*

Conference Chair: Alan J. Preis, CPA, MBA, Own Account

Field of Study: Taxation

Recommended CPE Credit Hours: 8

Course Code: 25961411 (In-Person); 35961411 (Live Webcast)

Member Fee: \$385 (In-Person); \$285 (Live Webcast)

Nonmember Fee: \$510 (In-Person); \$410 (Live Webcast)

For full program details and for FAE registration policy, please visit www.nysscpa.org/tristate14

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Plus take advantage of this unique opportunity to question the tax commissioners of

New York State
 New York City
 New Jersey
 Connecticut

Tuesday, January 28, 2014

The Princeton Club

15 West 43rd Street
 New York, NY 10036

Time: 8:50 a.m.—5:05 p.m. (Check-in begins at 8:15 a.m.)

Course Code: 25961411 (In-Person);
 35961411 (Live Webcast)

Mail this registration form along with payment information to:

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To register for the Live Webcast, visit www.nysscpa.org/e-cpe.

Register Today!

Visit www.nysscpa.org/tristate14 or call 800-537-3635

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