

# 2017 University of Connecticut Income Tax School

## November 14 & 15, 2017

### Radisson Hotel, Cromwell CT

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

Each registrant receives both the volumes of the 2017 *Federal Tax Workbook*. The volumes include chapters on due diligence and other ethical issues, education tax provisions, capitalization vs. repair update, small business issues, individual taxpayer issues, depreciation, foreign asset disclosure, trust accounting and taxation, and rulings and cases.

The 2017 Income Tax School will have an outstanding group of instructors from the Internal Revenue Service, the Connecticut Department of Revenue Services, and private legal and accounting practices. Each instructor has expertise in important federal or state taxation issues as well as teaching experience.

Alisa Lebovitz, Local Taxpayer Advocate, Taxpayer Advocate Service, (IRS) Hartford CT, will be available on Tuesday November 14<sup>th</sup> to assist with your problem IRS cases. She will be able to research the status of accounts for which you are having difficulty resolving issues with the IRS. Please bring a valid Form 2848, Power of Attorney.

Enrolled Agents attending this year's program will receive three credits of "federal tax law update" topics, seven credits of "federal tax law related" topics, AND two credits of "ethics" topics. UConn's IRS CE provider number and relevant program numbers will be made available to the participants during the tax school in November.

UConn tax school participants seeking credits to fulfill any continuing education requirements applicable to all the other categories of tax professionals (for example, CPAs) will be awarded 16 hours of Continuing Professional Education credits and will receive a University of Connecticut certificate of completion.

#### **Cost and Registration**

The registration fee is \$365\*\* with an early registration fee of \$350 for those whose registration is postmarked on or before October 15. Early registration is advised as registration is on a first-come, first served basis. Online registration is also available this year, please visit [www.ire.uconn.edu](http://www.ire.uconn.edu) for more details on how to register online.

**\*\*Please note: a 5% charge will be added to all credit card registrations to cover bank processing fees.**

The fee includes continental breakfast, lunch, break refreshments, the 2017 *Federal Tax Workbook*, and other course materials for both days.

Registration fees will be refunded if they are received after the enrollment limit has been reached. Your registration fee will be returned in full if a written cancellation request is received by October 31; from November 1 - November 7 a cancellation fee of \$95.00 will be charged. No refunds will be given after November 7 for cancellations.

#### **School Location**

The school will held be at the Radisson Hotel Cromwell, 100 Berlin Road, Cromwell, CT with easy access off I-91 - Exit 21 off I-91.

#### **Hotel Lodging**

Special discount rates are available to school registrants for overnight lodging at the Radisson Hotel Cromwell. Room rates are \$109.00 plus tax for single or double occupancy. To obtain the discount room rate, mention that you are attending the "University of Connecticut Income Tax School" and ask for the discount rate when you make the reservation. Reservations must be made by Nov. 1, 2017 to receive the discount rate.

Phone 860-635-2000 for reservations.

#### **Early Registration is suggested**

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

## Tuesday, November 14, 2017

**8:00 - 8:30 Registration and Continental Breakfast**

**8:30 - 8:35**

Welcome and Introductory Remarks

**Emma Bojinova, Tax School  
Coordinator**  
University of Connecticut

**8:35 - 10:05**

What's New in Federal Income Taxes?

**Eric L. Green, Attorney**  
Green & Sklarz, LLC

**10:05 - 10:20 Break**

**10:20 – Noon**

Ethics in Tax Practice: How to Avoid Violating  
IRS Circular 230

**Lisa Perkins**  
Associate Director, Tax Clinic  
University of Connecticut School of Law

**Noon - 12:45 Lunch at Hotel**

**12:45 – 1:55**

Update from the Taxpayer Advocate

**Alisa Lebovitz**  
Local Taxpayer Advocate  
Internal Revenue Service

**1:55 – 3:05**

IRS Key Messages

**Joseph McCarthy, CPA**  
Senior Stakeholder Liaison  
Internal Revenue Service

**3:05 - 3:20 Break**

**3:20 - 4:30**

TBD

Internal Revenue Service

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

## Wednesday, November 15, 2017

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

**8:30 - 10:05**

Fresh Start Program

**John Biello**  
Legislative Update  
**Susan Sherman**  
CT Department of Revenue Services

**10:05 - 10:20 Break**

**10:20 - 11:00**

How to respond to Bills and collection notices  
**Novelette Earlington & Margaret Hill**  
CT Department of Revenue Services

**11:00 - Noon**

A Practitioner's Perspective on CT Taxes

**Ryan Leichsenring, Attorney**  
Robinson & Cole LLP

**Noon-12:45 Lunch at Hotel**

**12:45- 1:55**

Employee Benefits Update

**Sharon Freilich, Attorney**  
Pullman & Comley LLC

**1:55 - 3:05**

The Estate Tax: Survey & Update

**Domenick Calabrese, Attorney & CT  
Probate Judge**  
Attorney & Counselor at Law, LLC

**3:05 - 3:20 Break**

**3:20 - 4:30**

Recent developments in Corporate and  
Partnership Tax – MIGHT CHANGE

**Stephen Utz, Professor**  
University of Connecticut School of Law

**4:30 p.m. End of Program**

## 2017 UConn Income Tax School Registration Form

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**Last Name**

**First**

**M.I**

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**Organization/Firm**

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**Address**

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**City**

**State**

**Zip**

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

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**Daytime Phone**

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**E-mail address**

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Number of people attending \_\_\_\_\_

Registration Fee: \$365.00 per person (**one form per registrant**)

Includes lunches, break refreshments, continental breakfast and tax manual

Early Registration Fee, if postmarked by

**October 15, 2017: \$350.00**

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

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

Claire Bazzano

University of Connecticut

Agricultural and Resource Economics

1376 Storrs Road, Unit 4021

Storrs, CT 06269-4021