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# University of Connecticut

Department of Agricultural and  
Resource Economics

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## The 2009 University of Connecticut Income Tax School for Practitioners

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

**November 17-18, 2009  
Rocky Hill, CT**

Sponsored by the  
University of Connecticut, Storrs  
In cooperation with the  
Internal Revenue Service  
and the Connecticut  
Department of Revenue Services

An Equal Opportunity Employer and Program Provider

The 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 for tax practitioners, accountants, consultants, attorneys and others who professionally prepare taxes.

Each registrant receives a copy of the 2009 *Income Tax School Workbook*. It includes chapters on new legislation, rulings and cases, net operating losses, related party issues, C corporations, dependent tax issues, retirement, individual taxpayer problems, ethics, small business issues, and basis.

The 2009 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.

People who attend the entire session will be awarded 16 hours of Continuing Professional Education Credit and will receive a University of Connecticut letter of completion.

### Cost and Registration

The registration fee is \$280 with an early registration fee of \$265 for those whose registration is postmarked on or before October 16. Early registration is advised as registration is on a first-come, first served basis.

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

Registration fees will be refunded if they are received after the enrollment limit has been reached. Your registration fee will be returned in full if a written cancellation request is received by November 2; from November 3 - November 10 a cancellation fee of \$95.00 will be charged. No refunds will be given after November 10 for cancellations.

### School Location

The school will be at the Rocky Hill Marriott, 100 Capital Blvd., Rocky Hill, CT, with easy access off I-91 (Exit 23 off I-91 South or Exit 23 off I-91 North).

### Hotel Lodging

Special discount rates are available to school registrants for overnight lodging at the Rocky Hill Marriott. Room rates are \$112.00 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 **Oct. 26, 2009** to receive the discount rate. Phone 860-228-9290 or 860-257-6000 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 Linda Lee/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).

## First Day

Tuesday, November 17, 2009

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

*Morning Session: Update on Laws, Rulings and Procedures Affecting Federal and State Taxes*

### 8:30 a.m. Morning Session Begins

- Welcome and Introductory Remarks  
**Linda Lee, Tax School Coordinator**  
University of Connecticut
- What's New in Federal Income Taxes  
**John O. Tannenbaum, Attorney**  
Hartford, CT
- Tax Traps Practitioners Need to be Aware of When Dealing With Related Party Transactions  
**Louis B. Schatz, Attorney**  
Shipman & Goodwin LLP

### Noon-1:00 Lunch at Hotel

*Afternoon Session: Federal Tax Topics*

- IRS Key Messages  
**Maggie Romaniello & Nancy Velez**  
Internal Revenue Service
- Financial Bank Account Reporting (FBAR)  
**Gary Watkins, Senior Tax Analyst**  
IRS Stakeholder Liaison  
Internal Revenue Service

- What's New at the Taxpayer Advocate  
**Fran Romano, Manager**  
IRS Taxpayer Advocate  
Internal Revenue Service

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

## Second Day

Wednesday, November 18, 2009

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

*Morning Session: Connecticut and Federal Tax Topics*

### 8:30 a.m. Morning Session Begins

- DRS Administrative Updates – Corporation, Business Entity Tax and Composite Tax Update  
**Norman Girard, Revenue Examiner**  
CT Department of Revenue Services
- Income Tax, Sales and Use Tax Tax Updates  
**Luke Byrne, Revenue Examiner**  
CT Department of Revenue Services
- A Practitioner's Perspective on Connecticut Taxes  
**Richard W. Tomeo, Attorney**  
**Felicia S. Hoeniger, Attorney**  
Robinson & Cole LLP

### Noon-1:00 Lunch at Hotel

*Afternoon Session: Federal and State Tax Topics*

### 1:00 p.m. Afternoon Session Begins

- Tax Traps for the Wary and Unwary in the Merger, Sale, and Acquisition of Business Interests  
**Morris W. Banks, Attorney**  
Pullman & Comley LLC
- Sales and Use Tax Audits in Connecticut  
**Alan E. Lieberman, Attorney**  
**Todd D. Doyle, Attorney**  
Shipman & Goodwin LLP  
*and*  
**Paul Greenfield**  
CT Dept. of Revenue Services
- The New Estate Tax  
**Kelly Galica Peck, Attorney**  
Halloran & Sage, LLP

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

**QUESTIONS?**  
Call (860) 486-1920  
or e-mail  
[claire.bazzano@uconn.edu](mailto:claire.bazzano@uconn.edu)

## 2009 UConn Tax School Registration Form

Name\_\_\_\_\_

Organization\_\_\_\_\_

Address\_\_\_\_\_

City\_\_\_\_\_

State\_\_\_\_\_ Zip Code\_\_\_\_\_

Telephone\_\_\_\_\_

E-mail address\_\_\_\_\_

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

Registration Fee: \$280.00  
(Includes lunches, break refreshments, continental breakfast and tax manual)

Early Registration Fee, if postmarked by **October 16, 2009**: \$265.00  
(Early Registration is advised. Registrations cannot be accepted after school capacity is reached.)

Please make check out 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