

New York / Connecticut Association of Tax Professionals

2009 Annual Tax Update Seminar December 4 & 5, 2009

Pages

- 1. Cover sheet**
- 2. Mailing Page**
- 3. Speaker Bios**
- 4. Full Schedule**
- 5. Friday Schedule and NY/CT-ATP info**
- 6. Saturday Schedule and CEU info**
- 7. Mail in Registration Form**

Following this cover sheet is a six page flyer (in PDF form) for our upcoming seminar. Thank you for taking the time to review this information. Here are a few key points for your information!

- ◆ NY/CT-ATP, a non-profit, member organization, has a 27 year history of running successful seminars and other events.
- ◆ Our Annual Tax Update Seminar has a great reputation among tax professionals, CPA's, EA's, and CFP's in CT and NY.
- ◆ You can register right here, right now by using our website and PayPal. http://www.nyctatp.org/december_seminar.php
- ◆ If you prefer to register by mail, please use the last page of this PDF and follow the instructions on that page (a fillable form).
- ◆ Early bird deadline is November 6th - Reg. closes November 20th
- ◆ Contact Gene Cassavechia if you have any questions;
gfccpa@earthlink.net or 203-746-6239

**NY/CT
ATP**

**New York/Connecticut
Association of Tax Professionals, Inc.
70 Middle Turnpike East
Manchester, Connecticut 06040-4258**

- **Our 27th Annual Update**
- **December 4th & 5th, 2009**
- **Federal Update**
- **New York State Update**
- **Connecticut Update**
- **Tax Law Changes**
- **Recent Developments**
- **Additional Tax Topics**

16 CPE for EA's, CPA's, & CFP's.

Register online at: www.nyctatp.org

Location: Danbury Plaza Hotel & Conference Center

“The best comprehensive tax update seminar in the region”

Instructor Information

Sue Voth, EA

Enrolled Agent

Sue Voth resides in Quincy, Illinois, where she has maintained her own practice since 1981, preparing tax returns for individuals, partnerships, trusts, and corporations. She attended Gem City Business College and Quincy College in Illinois. Ms. Voth has been an Enrolled Agent since 1983, and has held a Series 6 Securities license since 1986. She has been speaking professionally for tax groups such as NY/CT ATP and NATP since 1984. Ms. Voth is a past recipient of “e-filer of the year” for the state of Illinois, and belongs to professional organizations such as NATP, NAEA, and the local Kiwanis Club.

Cosimo “Cos” Borzumate, EA

Enrolled Agent

Cos has been self-employed as a tax practitioner in Fulton, NY since 1985, serving over twelve hundred clients. He is a member and instructor for NATP and the NY Chapter of the NATP since 1988. He served as a director, vice-president, and president of the NATP.

Karen Davis, EA, MBA, PhD

Enrolled Agent

Karen is a tax specialist at T.M. Byxbee Company in Hamden, CT, with over a decade of experience in tax planning and compliance. Karen earned her bachelor’s degree from Stanford University, and went on to earn a Ph.D. in political philosophy at University of California Santa Cruz. She attended Quinnipiac University in 2005 where she earned her M.B.A., and now teaches as an adjunct professor in QU’s School of Business. She is a frequent presenter at CPE seminars throughout Connecticut.

Seminar Information

This seminar is for tax practitioners and planners, with a working knowledge of existing tax laws. Our objective is a thorough update on Federal, NY, and CT tax law and new legislation and some specific other topics of interest.

New York/Connecticut Association of Tax Professionals

Seminar Schedule

Friday – December 4, 2009

8:00	to	4:50	Exhibitors
8:00	to	8:30	Registration & Continental Breakfast
8:30	to	10:30	Education Credits/Deductions Explored Roth Conversions with Tax Planning
10:45	to	12:30	New Dependency Exemption Issues I Do, I Don't (Marriage Issues) Part 1
12:30	to	1:30	Lunch (full sit-down lunch)
1:30	to	2:55	I Do, I Don't (Marriage Issues) Part 2
3:10	to	4:50	Connecticut Update & P/Y-N/R Returns

Saturday – December 5, 2009

8:00	to	4:50	Exhibitors
8:00	to	8:30	Registration & Breakfast
8:30	to	10:30	Federal Update – New Tax Law & Changes
10:45	to	12:30	Federal Update – Rulings & Regulations
12:30	to	1:30	Lunch (full sit-down lunch)
1:30	to	2:55	New York Update & P/Y-N/R Returns
3:10	to	4:50	Federal Update – continued Solutions by Sue (time permitting)

Seminar fee includes workshop, material, full sit-down luncheon, continental breakfast, and morning & afternoon refreshments each day.

Fee:	Early Bird (by 11/6) \$330.00 Regular Registration (by 11/20) \$360.00 (PayPal date - Postmark date, not meter date) Confirmations will be posted to www.nyctatp.org
Where:	Danbury Plaza Hotel & Conference Center 18 Old Ridgebury Road, Danbury, CT Directions: I-84 E Exit 2, I-84 W Exit 2A Telephone (203) 794-0600 Group Rate for Rooms is \$105.00 (ask for it)

Contact Person: Gene Cassavechia 203-746-6239
gfccpa@earthlink.net

***“The best comprehensive tax update seminar in the region”
Come join our progressive organization!
Visit us at: www.nyctatp.org***

Friday, December 4, 2009

Federal Tax Topics & Update

Sue Voth, Enrolled Agent

- ◆ Education Deduction
- ◆ Education Credits
- ◆ Roth IRA Conversions
- ◆ Roth Conversion Tax Planning
- ◆ Dependency Issues under new rules
- ◆ Dependency Tie Breaker Rules
- ◆ I Do, I Don't – Marriage Tax Issues

Connecticut State Tax Update

Karen Davis, EA, MBA, PhD

NY/CT-ATP

***New York/Connecticut Association
of Tax Professionals, Inc.***

NY/CT-ATP is a non-profit organization established in 1982 to meet the needs of tax practitioners in S.E New York and Western Connecticut. We have six monthly meetings and two seminars with CEU's (outside of tax season) in which top speakers discuss timely topics. Scholarship awards are given out annually to encourage our members to attend seminars. NY/CT-ATP subsidizes our annual tax update seminar to members who have attended meetings. Tax publications, monthly meetings, and other seminars are also subsidized to enhance the education of our members. **Come join us and be part of this progressive, professional organization. We have members from New York City to Hartford to Poughkeepsie. For more information, visit us at www.nyctatp.org.**

Saturday, December 5, 2009

Federal Tax Topics & Update

Sue Voth, Enrolled Agent

- ◆ Federal Update
- ◆ New Tax Law and Changes
- ◆ Forms and Recent Developments
- ◆ Recent Court Cases and Letter Rulings
- ◆ Solutions by Sue (time permitting)

New York State Tax Update

Cosimo “Cos” Borzumate, Enrolled Agent

**This program qualifies for a total of
16 Continuing Education Units**

We have entered into an agreement with the office of the Director of Practice, Internal Revenue Service to meet the requirements of Code 31 of the Federal Regulations section 10.6(g), covering maintenance of attendance records, retention of program outlines, qualifications of instructors, and length of class hours. The agreement does not constitute an endorsement by the Director of Practice as to the quality of the program.

NY/CT-ATP – Benefits of Membership

- Six subsidized dinner meetings each year
- Speaker and CEU's at each meeting
- Fifteen scholarships awarded to members every year
- Subsidized tax book package to help with tax season
- October seminar with 8.0 CEU's including 2.0 of ethics
- December two-day tax update seminar on Fed, NY, CT. 16 CEU's
- Rebate program for members attending meetings & Dec. seminar
- Member emergency assistance program (for illness, death, etc.)
- Networking among fellow tax professionals
- Entertaining time with peers

**Register
Online @
www.nyctatp.org
via PayPal**

*New York/Connecticut
Association of Tax Professionals, Inc.*
For mail in registration see below, otherwise register ONLINE.
**Send your form and payment to:
NY/CT-ATP, 70 Middle Tpk East, Manchester, CT 06040-4258**

**or - Mail in
Registration
Form**

**Please register me for the Federal, NY, & CT tax update at the Danbury Plaza Hotel & Conference Center
18 Old Ridgebury Road, Danbury, Connecticut - December 4th & 5th, 2009**

Early Bird Registration	Postmarked or PayPal by 11/06/09	\$330.00 per person
Regular Registration	Postmarked or PayPal by 11/20/09	\$360.00 per person

Confirmations will be posted to www.nyctatp.org A postage meter date is not a postmark date!

Important Information	Attendee Information – Please Print Neatly
Mail to “NY/CT ATP Seminar” at above address	Attendee Name:
Checks should be payable to NY/CT-ATP	Company Name (if any):
Payment must accompany this form for mail in reg.	Street:
No Refunds after 11/27/09 – Substitutions permitted	Town, State, Zip:
Confirmations will be posted at www.nyctatp.org	Contact e-mail:
Seating is limited – Register early!	Contact Phone:

Complete & return one form per person – make copies as needed