



**NEW JERSEY ASSOCIATION
OF PUBLIC ACCOUNTANTS**

*Serving Accountants, Tax and
Financial Professionals since 1947*

**ANNUAL FALL SEMINAR
MONDAY AND TUESDAY, SEPTEMBER 22 & 23, 2014
SHERATON HOTEL -- EATONTOWN**

16 CPE/CE IN TAXES - FEDERAL TAX UPDATE

All programs are designed as diversified seminars for which you can receive credits
Objective – To provide a foundation in concepts and practical applications of taxes and tax law
Level of Study – Update—No prerequisite required
Delivery Method – Group - Live

Who Should Attend? Licensed Public Accountants, Certified Public Accountants,
Enrolled Agents, RTRP's, employees and students.

NATIONAL REGISTRY OF CPE SPONSORS

The New Jersey Association of Public Accountants is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Suite 700, Nashville, TN 37219-2417 or by visiting the website: Website: www.nasba.org

**THIS SEMINAR IS APPROVED BY NASBA FOR CPE CREDIT IN PENNSYLVANIA AND NEW YORK
AND BY THE IRS FOR CE CREDIT FOR ENROLLED AGENTS**

ABOUT OUR SPEAKERS and OVERVIEW OF SEMINARS

Monday, September 22 (8:00AM – 4:30PM) **8 CE Federal Tax Update (Enrolled Agents)** **8 CPE Taxes (Licensed Accountants)**

- **Keith S. Balla, Christine G. Pronek, Partners, O'Connor Davies, LLP.** Mr. Balla oversees the Government and Business Litigation groups, in which he supervises and manages staff accountants, managers and partners for all business litigation and forensic accounting engagements. Ms. Pronek is an Estate and Trust partner with over 15 years of experience in public accounting and 3 years with the Internal Revenue Service.
 - Estate Taxes – Overview of current estate tax system, federal and state; Gifting; Basic documents needed; Testamentary trusts
 - Forensics – Fraud; Family law; Valuations; Economic damages; Bankruptcy; Economic analysis, Computer forensics; Accounting malpractice; Litigation support
- **Lyle E. Lauterbach, Senior Technical Analyst, Taxpayer Advocate Service, Office of Systemic Advocacy.** Mr Lauterbach is a 1973 graduate of Seton Hall University and has held various positions with the IRS, including IRS Collection Division, IRS Problem Resolution Officer and Taxpayer Advocate Service Headquarters.
 - Brief Overview of TAS; How to get cases into TAS; Overview of TAS-Systemic Advocacy; How to provide issues to TAS-SA; Overview of the 2013 NTA Annual Report to Congress.
- **Richard J. Sapinski, member, Sills Cummis & Gross, P.C.** Mr. Sapinski's practice involves white collar criminal defense on both federal and state levels and civil and criminal tax litigation, as well as international tax planning and compliance issues.
 - New Options Available Under the Changes to the IRS Offshore Voluntary Disclosure Program Announced June 18, 2014; FBARs and Offshore Reporting; How to Claim Innocent Spouse Relief; Appealing IRS Penalty Determinations; IRS Sensitive ("Eggshell") Audits

Tuesday, September 23 (8:00AM – 4:30PM) **8 CE Federal Tax Update (Enrolled Agents)** **8 CPE Taxes (Licensed Accountants)**

- **Stephen D. Leightman, AWM, and Mark J. Evans, AWM. RBC Wealth Management.** Mr. Leightman joined the securities industry in 1977. Before joining RBC Wealth Management, he was with three other investment firms where he served as a financial consultant, branch manager, national sales manager, and vice president of investments. Mr. Evans owned and managed a successful local CPA firm and served as treasurer and chief financial officer of a large privately held company.
 - Economic Recovery – Political stalemate; Social security; Potential tax changes; Retirement plans
- **Susan A. Feeney, Partner, McCarter & English, LLP.** Ms. Feeney concentrates in the areas of state taxation and local property taxation and is a graduate of Fordham law school.
 - New Jersey Sales and Use Tax – Update and overview

Schedule of time for both days: Registration and continental breakfast is from 7:00 am to 8:00 am; Education session is from 8:00 am to 4:30 pm; Lunch (included in the fee) from 12:00 noon to 1:00 pm.

**SEMINAR REGISTRATION FORM -- MONDAY AND TUESDAY, SEPTEMBER 22 & 23, 2014
SHERATON HOTEL -- EATONTOWN**

Telephone registrations not accepted unless paid by **Visa** or **MasterCard**. Please use one registration form for **EACH** individual attending. Please circle the name of the credit card that you will be using.

NAME: _____

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PTIN NUMBER _____ **(ENROLLED AGENTS ONLY)**

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MAIL TO: NJAPA

1410 SHORE ROAD

NORTHFIELD, NJ 08225 (MAKE CHECK PAYABLE TO: NJAPA)

PHONE: (855) 677-0785

FAX: (609) 645-2440

TO REGISTER ON-LINE FOR ANY OF OUR STATE SPONSORED SEMINARS --GO TO NJAPA.INFO, LOOK FOR THE SEMINAR AND REGISTER. NEED HELP OR HAVE QUESTIONS, CALL 855-677-0785.

Before 9/12 / After 9/12

NJAPA / NSA MEMBER **360 / 390 X _____ = _____**

NON MEMBER RATE **435 / 465 X _____ = _____**

1-DAY ONLY RATE--MEMBER **265 / 310 X _____ = _____ (CIRCLE ONE: MON/TUES)**

1-DAY ONLY RATE-NON MEMBER **310 / 350 X _____ = _____ (CIRCLE ONE: MON/TUES)**

*****Same firm discount--First attendee is full price--everyone else is \$15 discount per attendee****

REFUND POLICY: CANCELLATION PRIOR TEN DAYS BEFORE EACH SEMINAR MUST BE IN WRITING. CANCELLATION FEE IS \$50.00--NO EXCEPTIONS. NO CASH REFUNDS. Credit memos will be issued redeemable for a future State sponsored seminar within ONE year of issue. For more information regarding administrative policies such as complaint and refund, please contact our offices at (855) 677-0785. AFTER TEN DAYS NO REFUNDS AND NO CREDIT. No substitutions permitted. PLEASE NOTE: A \$20.00 FEE WILL BE CHARGED ON ANY RETURNED CHECKS.

ATTENDEES ARE RESPONSIBLE FOR MAKING THEIR OWN ROOM RESERVATIONS

**Hotel telephone number is as follows:
Sheraton -- (732)542-6500. Rates are \$149++ per night plus tax--CUT OFF DATE IS SEPTEMBER 12, 2014 - YOU MUST MENTION "NJAPA" WHEN MAKING YOUR RESERVATION.**

NJAPA MEETING ROOMS, EXHIBITOR AREA AND BANQUET ROOMS ARE SMOKE FREE. PLEASE TURN OFF CELLULAR PHONES IN THE MEETING ROOM. RECORDING OF THIS SEMINAR IS STRICTLY PROHIBITED. PLEASE BRING APPROPRIATE ATTIRE AS WE CANNOT SET TEMPERATURES TO PLEASE EVERYONE IN THE ROOM.

MARK YOUR CALENDAR NOW FOR FUTURE NJAPA SEMINARS

**** 2014 Tax Practitioner Institutes ****

Thursday, November 6, 2014

Locations: Middlesex County College, Gloucester County College, County College of Morris,
Mercer Community College, Georgian Court University, Kean University

**** Annual Accounting & Auditing Seminar ****

Thursday, November 13, 2014

Suburban Golf Club, 1730 Morris Ave, Union, NJ

Speakers from Loscalzo Associates

**** December 8 & 9, 2014 – Tropicana Casino Resort, Atlantic City ****

1040 Tax Update

Jennings Seminars