

Tax Institute 2016

The Internal Revenue Service and the Delaware Division of Revenue are proud to sponsor the 40th Annual Federal and State Tax Institutes. The Institutes consist of presentations for tax-return preparers and practitioners and are offered at three Delaware locations during December 2016.

The Internal Revenue Service and the Delaware Division of Revenue are jointly sponsoring the Institutes. The goal of the institutes is to update, clarify, and explain federal and state tax law reporting requirements and any new tax law developments.



DIRECTIONS:

University of Delaware - New Castle County
Clayton Hall
100 David Hollowell Drive
Newark, DE 19716

Take I-95 to exit 1B, Merge onto Rt. 896 North (S. College Ave) towards Newark, turn left at dead end (Main St.), continue on Rt. 896 making a right on New London Road, then a right onto Pencader Way.

Dover Downs - Kent County
1131 North DuPont Highway
Dover, DE 19901

www.doverdowns.com

Conference Center is located on the Northbound side of Route 13, at Dover Downs Raceway.

Rehoboth Beach - Sussex County
Atlantic Sands Hotel & Conference Center
101 N Boardwalk
Rehoboth Beach, DE 19971
www.atlanticsandshotel.com

From DE-1 take Rehoboth Ave/DE-1 Alt E. At the traffic circle, continue straight onto Rd 15/Rehoboth Ave. Make a left onto 1st Street, then a right onto Baltimore Ave. When using a GPS for directions please enter 1 Baltimore Avenue as the address.

MATERIALS & LAPTOP USAGE:

All Tax Institute attendees will receive a thumb drive containing the speakers' presentations and notes. Laptops are not provided but please feel free to bring your own if you wish to view the information on the thumb drive during the Tax Institute. Division of Revenue is not responsible for lost or damaged laptops or for supplying batteries, charging stations or extension cords.

NJ & PA TAX UPDATES:

New Jersey and Pennsylvania **will not** be presenting at this year's Tax Institutes.

CERTIFICATES:

Attendees **must sign out** before leaving to receive their CE or CPE credits. **If you do not sign out, no CE or CPE credits will be issued.**

All certificates will be emailed within **2-3 weeks** after the Tax Institute. Please **make sure we have your current email address** if you wish to receive your certificate in a timely manner.

CPAs - CPE CREDITS:

Complete attendance during each session is required in order to earn the associated credit. No half or partial credits will be given. CPAs can earn a maximum of eight (8) CPE credits.

EA & AFSP Participants - CE CREDITS:

Complete attendance during each session is required in order to earn the associated credit. No half or partial credits will be given. EA and AFSP Participants can earn a maximum of six (6) CE credits. **When completing this registration form your name must match the name you used to file for your PTIN#.**

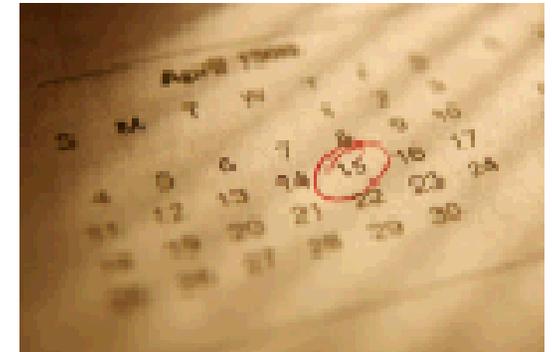
CERTIFICATE OF ATTENDANCE:

Complete attendance during each session is required in order to earn the associated attendance hour. No half or partial hours will be given. Non CPAs can earn a max. of (8) hours of attendance.

Note: CPAs, Attorneys, and others licensed by state boards/organizations should check with their respective boards/organizations to determine if these credits/hours apply toward their continuing education requirements.



WELCOME TO THE 40th ANNUAL FEDERAL AND STATE TAX INSTITUTES



**Sponsored by the Internal Revenue Service
and the Delaware Division of Revenue**



Delaware Division of Revenue

Tax Institute 2016

SCHEDULED SESSIONS:

- ❖ Delaware Personal & Business Tax Updates
- ❖ The Affordable Care Act - What you Need to Know for 2017
- ❖ Highlights of 2016 Income Tax Law Change
- ❖ Maryland Tax Updates
- ❖ Identity Theft 2017 from a Practitioner's Perspective
- ❖ 2016 IRS Tax Practitioner Institute Topics
- ❖ S-Corporations
- ❖ Safeguarding Taxpayer Data - Protect Your Clients and Yourself



EARN UP TO 8 CPE OR 6 CE CREDITS

SPEAKERS:

Internal Revenue Service

Richard Furlong, Sr. Stakeholder Liaison
Steve Connor, Stakeholder Liaison

Gunnip and Company

Valerie Middlebrooks, CPA, Partner

Delaware

Patrick Carter, Director of Revenue
James Stewart, Asst. Director, Office of Tax Processing
Michael Smith, Asst. Director, Office of Tax Enforcement

Maryland

Chris Kolb, Manager, Media Section, RAD
Sarah Dufresne, Manager Legal Section, RAD

FEE: \$50.00

The Registration fee for the Tax Institute is **\$50.00** and includes materials, continental breakfast, and a certificate of completion. Registration and check-in start at 7:30 a.m. The Institute begins **promptly** at 8:00 a.m. and ends at 4:30 p.m.

LUNCH:

A Country Livin' BBQ Buffet will be available for an additional cost of \$25.00 at the University of Delaware - Clayton Hall location only.

Lunch includes: Country Glazed Chicken, Sliced Brisket, Four Cheese Baked Macaroni and Cheese, Southern Barbecued Baked Beans, Traditional Slaw Salad, Cornbread Fiesta Muffins, and Assorted Cookies and Dessert Bars.

REGISTRATION:

Complete the attached form to register. Payment must be in the form of Check or Money Order and made payable to the **Delaware Division of Revenue**. Mail registration form and payment to the address listed on the form. Registrations **must** be received by Nov. 23, 2016. Late registrations will be accepted on a space-available basis.

LOCATION CHANGE:

Only one change of location per registration is allowed and only when space is available. To change your registration, submit a written request at least five working days before the first of the three Tax Institute dates.

WITHDRAWALS AND REFUNDS:

Withdrawal and refund requests must be submitted in writing. If written notice is received at least five working days before the Tax Institute for which you are registered, the registration fee, will be refunded. No refund will be made after that time. Stopping payment on checks for registration does not constitute an official withdrawal, and there is a \$30 charge for dishonored checks.

CANCELLATION:

We reserve the right to amend or cancel the Tax Institute. In the event of cancellation, you will receive a full refund.

Registration Form

PLEASE REGISTER ONLY ONE PERSON PER FORM. Photocopy this form as necessary. Payment must accompany this form. For more information, please call (302) 577-8688.

Please indicate the date and location of the Tax Institute you prefer. Registration Fee is **\$50.00**.

- Mon., Dec. 5, 2016 - Dover Downs Conference Center
 Tues., Dec. 6, 2016 - Atlantic Sands Hotel & Conference Ctr
 Fri., Dec. 9, 2016 - University of Delaware, Clayton Hall

Please Check To Purchase Lunch (\$25.00)

- University of Delaware - Clayton Hall

Name (Attendee)

Mailing Address

Telephone

E-Mail Address (Required to receive certificate)

PTIN# (Required to receive CE credits)

Please check one of the following:

- CPA Enrolled Agent
 Annual Filing Season Program Participant (AFSP)
 Other _____

METHOD OF PAYMENT

Check or Money Order

PAYABLE TO: Delaware Division of Revenue
820 N. French Street
Wilmington, DE 19801
Attn: Carol P. Thomas