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Upcoming One-Day Tax Seminars

New Jersey One-Day Tax Seminar
Hilton Woodbridge Hotel
Iselin, NJ
October 22, 2013
Brochure Registration Form

Georgia One-Day Tax Seminar
The Westin Atlanta Perimeter North
Atlanta, Georgia
November 1, 2013
Brochure Registration Form

Income Tax Symposium
Renaissance Esmeralda Hotel
Indian Wells, California
November 3 - 6, 2013
Brochure Registration Form Hotel Reservation

Property Tax Symposium
Renaissance Esmeralda Hotel
Indian Wells, California
November 3 - 6, 2013
Brochure Registration Form Hotel Reservation

Final Two Programs of 2013

ATTEND ONE
This year’s program was held at the Gaylord Texan Resort & Convention Center in Dallas, Texas. The program covered a diverse number of credit and incentives tax-related topics; delivered in general and breakout session formats. There were 250 people in attendance. The Honorable Michael R. Pence, Governor of the State of Indiana was the keynote speaker.

The Institute sincerely thanks the 2013 Credits and Incentives Symposium Committee for its diligent work on this three-day program that began on September 22, 2013. Chair Minah C. Hall, Esq. and Co-Vice Chairs Steven A. Carter, CPA, and Marcus Panasewicz, are to be congratulated for their guidance in all of the committee’s proceedings.

Breakout Session: “Across the Pond: Global Incentives”. Speakers Daniel P. Domenicucci, CPA; Eric R. Nieu-kirk and Terry L. Hansen

Attendees during Monday morning general session

IPT President Arlene M. Klika, CMI; The Honorable Michael R. Pence, Governor of the State of Indiana and Symposium Committee Chair Minah C. Hall, Esq.

“New Markets Tax Credit: Different Per-spectives”. Speakers Kevin R. Goldsmith and Reto Mueller, CTM

Co-Vice Chair: Steven A. Carter, CPA; Chair Minah C. Hall, Esq. and Co-Vice Chair Marcus Panasewicz
“Mind Your Cs and Cs” Compliance and Clawbacks” Speakers Aadarsha Basavarajurs, CPA and Denise M. Obrochta, Esq.

“State Economic Development Panel (Georgia, Michigan, Missouri)” Speakers Christopher Chung, Blair Burns, and Michael A. Finney

“Windfalls and Pitfalls” Christine Bustamante, Jubal Smith, CEdC and Janette M. Lohman, CMI, Esq., CPA

“State Economic Development Government Panel (Indiana, Oklahoma, and New Jersey)” Speakers Victor Smith, Charles Kimbrough and Michael Chrobak

“Behind the Scenes: Do’s and Don’ts from an Industry Perspective” Speakers Patricia A. Chow, MBA, CPA; Teresa J. Lynch, Esq., LL.M; Warren D. Wood, MBA and Brenda B. McMeans, CPA
### 2013 CREDITS AND INCENTIVES SYMPOSIUM HIGHLIGHTS (continued)

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<th>Symposium Sponsors</th>
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### 2013 Credit and Incentives Symposium Committee

- **Chair:** Minah C. Hall, Esq., True Partners Consulting LLC
- **Co-Vice Chair:** Steven A. Carter, CPA, Grant Thornton LLP
- **Co-Vice Chair:** Marcus Panasewicz, Deloitte Tax LLP
- Edward J. Baran, Jr., CPA, Fenwal Inc.
- Julia S. Bragg, CMI, CPA, International Paper Company
- Jesse D. Broderick, CPA, Sumit Credits, LLC
- Peggy Estes, CPA, Walmart Stores, Inc.
- Sherri B. Fetzner, PricewaterhouseCoopers LLP
- Christopher J. Girod, CPA, Ryan, LLC
- Lee Higgins, Site Selection Group
- Andrienne Albritton-Mays, CMI, McGladrey LLP
- Amy Nelson, Ernst & Young LLP
- Jane Henig Orlin, ADP
- Jaime S. Reichardt, Esq., Reed Smith LLP
- Jennifer Thompson, CPA, The Coca-Cola Company
- Jeff J. Troan BCCR/SLRC, Lockheed Martin Corporation
- Dean J. Uminski, CECd, Crowe Horwath LLP
- Aneeqa Virgil, KPMG LLP
- Neal P. Wieschhaus, CMI, CPA, Duff & Phelps LLC
This year’s program was held in beautiful Monterey, California, and had a very large attendance of 638 registrants and speakers. Attendees came from all over the United States and Canada. The program consisted of five general sessions and forty-two breakout sessions on diverse topics in the sales tax area.

The Sales Tax Symposium Committee began planning the program at its January meeting held in Houston, Texas. The committee members, and its Chair, Carolyn C. Shantz, CMI, CPA, are to be congratulated for the tremendous amount of work that went into organizing the final program which was so well received. And many thanks are extended to all of the speakers who gave so generously of their time and to the sponsors.

A few photographic highlights of the Symposium follow as well as of the Committee members along with a list of the program sponsors.
The program was held at the Hyatt Regency - Monterey, where the weather cooperated the entire time

Three IPT Past presidents were present at the Symposium (left to right): Richard V. Carlson, CMI, CPA; Linda A. Falcone, CMI; Lee A. Zoeller, CMI, Esq.

The Institute was honored to have the Executive Director of the California State Board of Equalization, Cynthia Bridges (left), give an update on BOE activities (being greeted by Carolyn Shantz, CMI, CPA)

One of the two scheduled luncheons

An example of the well-attended breakout sessions of which there were forty-two topically

Registrants enjoying the opening Sunday reception
Prior to the commencement of the Symposium, the CMI - Sales Tax Committee administered the CMI written and oral examinations over a two-day period.

### 2013 Sales Tax Symposium Committee

- **Loren L. Chumley**
  Principal
  KPMG LLP
  Nashville, Tennessee

- **Elizabeth Creager, CPA**
  Executive Director - Transaction Tax
  AT&T
  San Antonio, Texas

- **Diana M. DiBello**
  Director, Tax Solutions
  De Lage Landen
  Wayne, Pennsylvania

- **Clark Hemingway, CMI**
  Senior Exams Analyst
  General Electric Company
  Fort Myers, Florida

- **Roy Hui, CMI**
  Managing Director
  Thompson Tax & Associates, LLC
  Sacramento, California

- **Timmy Hulin, CMI**
  Director of Audits
  Didier Consultants
  Zachary, Louisiana

- **Angela K. Mathis, CMI**
  Sales and Use Tax Manager
  Davidson Hotels and Resorts
  Memphis, Tennessee

- **Marla B. Northcut, CMI, CPA**
  Manager, Sales and Use Tax
  International Paper Company
  Memphis, Tennessee

- **Gina M. Pizzo, CMI**
  Senior Director
  Alvarez & Marsal Taxand, LLC
  Houston, Texas

- **Carolyn Campbell Shantz, CMI, CPA (Chair)**
  Tax Manager
  Superior Energy Services, Inc.
  Houston, Texas

- **Doug Sigel, Esq. (Vice Chair)**
  Ryan Law Firm LLP
  Austin, Texas

- **Scott Steinbring, CPA**
  Partner - State & Local Tax
  Grant Thornton LLP
  Houston, Texas

- **Dwayne Van Wieren, CPA**
  Partner
  Deloitte Tax LLP
  Los Angeles, California

- **Marilyn A. Wethekam, Esq.**
  Partner
  Horwood Marcus & Berk, Chartered
  Chicago, Illinois

- **Michael R. Woznyk, CMI**
  Principal
  Ernst & Young LLP
  New York, New York
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We thank all of the speakers who, in many cases, made long trips to participate in the program, and also thank them for their preparatory materials.

Photographic highlights follow, along with a list of the sponsors whose support we so appreciate.
Stay Connected

We encourage you to join the IPT LinkedIn Discussion group and share the group with other tax professionals in your network. Thank you to IPT members who have already joined the IPT LinkedIn Group, as we now have over 2,600 members.

Follow IPT on Facebook and Twitter and like our Facebook page for updates on IPT event registration, photos, and other IPT news.

If you have not already done so, please join these groups today by clicking on the icons below.
New Members

Property Tax Members

Peter A. Brakora
ConocoPhillips Company
Anchorage, AK

Brandon Caplena
Wal-Mart Stores, Inc.
Bentonville, AR

Rotem Carmel
Grant Thornton LLP
Ft. Lauderdale, FL

Deliana Escobari
Ernst & Young LLP
Chicago, IL

Mark Hoban
Property Valuation Services
Overland Park, KS

Gerald McNicholas
Walgreen Co.
Deerfield, IL

Jay Shroff
Wilson & Franco
11000 Richmond Avenue
Houston, TX

Brent Stewart
Flint Hills Resources, LP
Wichita, KS

Lee M. Wharton
Marvin F. Poer and Company
Atlanta, GA

Sales Tax Members

Rosemary Bloom
T-Mobile USA, Inc.
Bellevue, WA

Jennifer Carstens
Johnson Controls, Inc.
Milwaukee, WI

*Amanda Chambers
The Gores Group
Boulder, CO

*Dana Collins
Stryker Corporation
Portage, MI

Amanda Gebicki
Grant McCarthy Group
White Plains, NY

John P. Gibboney
Deloitte Tax LLP
Houston, TX

Yasir Haider
Zale Delaware Inc.
Irving, TX

Regina Johnson
McGladrey LLP
Dallas, TX

Paul Okune
KPMG LLP
Mableton, GA

*Steven T. Wiant
Union Tank Car Company
Chicago, IL

Ian Zelenski
UHY Advisors SALT, LLC
Houston, TX

See Rennie
Fidelity National Financial, Inc.
Jacksonville, FL

Erica Russell
Terex Corporation
Monroe, OH

Katherine Anne Sullivan
KPMG LLP
Atlanta, GA

*denotes Regular members
**New Members** (continued)

**VAT Members**

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<tr>
<th>Name</th>
<th>Company</th>
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<tr>
<td>Eric Moore</td>
<td>KPMG LLP</td>
<td>Santa Clara, CA</td>
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<tr>
<td>Sandeep Sharma</td>
<td>KPMG LLP</td>
<td>Chicago, IL</td>
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**Accepted Sales Tax Affiliate**

French Brown  
Hopping Green & Sams  
Tallahassee, FL

IPT Board of Governors policy requires that names of all affiliate members appear in our monthly newsletter. Please direct any relevant information or comments regarding admission to membership to the IPT office.

**JUST 1 MORE**

- Barbara A. Britt, CMI, CPA  
- Marman C. Cardova  
- Gary M. Crump, CMI  
- Douglas B. Esmond, CMI  
- Linda A. Falcone, CMI  
- Michael O. Fannon, CMI  
- Kathleen A. Foster, CMI  
- Karolyn Gatlin-Purnell, CMI  
- Shakina R. Higgs  
- Kent A. Hileman, CMI, MAI, ASA, MRICS  
- Jennifer S. Goldstein, Esq.  
- Erin James  
- Cory Malburg  
- Diane Martin  
- Carissa S. McGarry  
- Paul E. Miller, CMI  
- Laura Molloy  
- Olga Palayo  
- Bruce M. Pierce, CMI  
- Susan Pretet  
- Brandilyn Shay Price  
- Sharon Rodgers  
- Jeffrey Shamma, CMI  
- Benjamin Smith, Esq.  
- Adam C. Strasser, CMI  
- Marcella A. Stulce, CMI  
- Kathleen Suvanich, CMI  
- Charles B. Terrell, Jr., CMI  
- Gerhart C. Van Note  
- Sharon Marie Welhouse

Members who refer at least one new member to IPT participate in a prize drawing at IPT’s Annual Conference Business Meeting. Each time you refer a new member to IPT, your name will be entered into the drawing. In order to receive recognition and the opportunity to participate in the drawing, please make sure the person(s) you refer includes your name on their application. As your association grows, IPT can bring you better benefits, such as greater educational opportunities. Please participate in the Just 1 More Campaign and help in the continued growth of IPT. Individuals who referred one or more new members during the previous month are listed above.
LOCAL LUNCHEON HIGHLIGHTS

The first IPT Local Luncheon in the Washington, DC area, in many years, was held in McLean, Virginia, at Maggiano’s Restaurant in Tyson’s Corner. About forty SALT professionals attended from all over the metro area, and the attendance numbers were almost equally split between Income, Sales, and Property taxes.

The group was honored with two notable speakers: Jordan M. Goodman, Esq, CPA, of Horwood Marcus & Berk Chartered, Chicago; IL., and Diann Smith, Esq., McDermott Will & Emery, Washington, DC. Two topical areas were addressed: “Alternative Apportionment” and “Situs.”

Co-Chairs, Carolynn Iafrate Kranz, CPA, Esq., Kim Ruiz, along with Erica Cline, CPA, April Nevarez, CMI, and Anna Tseng have planned their next lunch at the same location on December 5, 2013.
On September 24th, the Houston Area Local Luncheon committee: Sam Kinslow, CMI, Kerry Albright, Nola Newcomb, Robin Freeman, CMI, Diane Brown, CMI, Doug Mazuur and Glannetta Jackson, held a well-attended luncheon at the Hyatt Regency in Houston. Dr. Ted Jones, Ph.D. was the speaker. He spoke about “Economic Update and Business Outlook”. He addressed key questions about the economy and the impact on our companies. He discussed issues ranging from economic recovery, unemployment, commercial property values, and whether or not the current economy represents the new “normal”. His presentation was very interactive and well received.

### UPCOMING LOCAL LUNCHEONS

<table>
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<tr>
<th>Location</th>
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<th>Time</th>
<th>Topic</th>
<th>Speakers</th>
<th>Contact</th>
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<tr>
<td>New York Area</td>
<td>Reed Smith LLP’s New York Office</td>
<td>12:00 noon</td>
<td>Technical and Operational Issues</td>
<td>Commissioner Thomas Mattox and Executive Deputy Commissioner Nonie Manion, NYS Department of Taxation and Finance</td>
<td>Jennifer Goldstein: <a href="mailto:jsgoldstein@reedsmith.com">jsgoldstein@reedsmith.com</a></td>
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<td>November 14, 2013</td>
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<td>Charlotte Area</td>
<td>Duke Mansion</td>
<td>11:15 am</td>
<td>Tax Reform &amp; North Carolina’s Changing Landscape</td>
<td>Tony Buffkin, John Iannotti and Tom Yonchak from Dixon, Hughes, Goodman LLP</td>
<td>Kathleen Foster, CMI</td>
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<td>November 20, 2013</td>
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<td><a href="mailto:kathleen.foster@dimensiondata.com">kathleen.foster@dimensiondata.com</a></td>
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A CMI is a Certified Member of the Institute for Professionals in Taxation. Certification is offered in three separate and distinct categories: State Income Tax, Property Tax, and Sales and Use Tax. Below are ten great reasons to become a CMI.

1. **Credibility.** Business units within a company, outside clients, and taxing authorities interacting with a CMI can have confidence that the CMI is knowledgeable, experienced, subscribes to ethical standards, and maintains a high level of expertise through required continuing education.

2. **Professional credentials.** Attaining the CMI designation may satisfy governmental regulatory requirements. For example, in some states the designation exempts property tax professionals from licensing examination requirements. The designation may also qualify a CMI to testify as an expert witness.

3. **Recognition of achievement and stature.** The designation is a formal recognition by the CMI's peers that the holder of the designation has achieved a high level of expertise and proficiency as a tax professional. By satisfying rigorous experience, educational and testing requirements, the CMI has earned increased stature within his profession.

4. **IPT Code of Ethics.** The Code of Ethics strengthens the integrity of the designation, by providing that CMIs are not only bound by the Code, but are also obligated to help enforce it.

5. **Promotion of the profession.** By exemplifying high standards of excellence in the field, CMIs enhance the image of the profession inside and outside industry.

6. **Uniqueness.** The CMI is the only designation available for State Income Tax, Property Tax and Sales Tax professionals.

7. **Career opportunities and employment security.** A CMI has an advantage generally in the marketplace, and specifically when seeking a promotion, increased compensation, or additional responsibility. Certification establishes the willingness of a CMI to invest in his or her own professional development, and identifies the CMI as an individual who can adapt to changes in technology and business practices.

8. **Self-esteem.** The CMI defines himself or herself beyond a job description or academic degree. As a certified professional, the CMI can control his or her own professional destiny and derives a deep sense of personal satisfaction from it.

9. **Commitment to the profession.** Achieving the designation demonstrates to the CMI's peers, colleagues, and superiors
that he or she is committed to the tax profession and is capable of performing at or above established standards. University degrees no longer represent the full measure of professional knowledge and competence in the market, and certification sets the CMI apart as a leader in the field of state and local taxation.

10. **Leadership and teaching opportunities.** Because CMIs have demonstrated expertise in the field, the profession naturally looks to them to provide ideas and strategies for the continued enhancement of their discipline. Similarly, they are the most qualified individuals to help with the education and training of others who are new to the field.

The major requirements for the CMI Professional Designation include membership in the Institute, at least five years of relevant tax experience, completion of prescribed educational requirements, and successful completion of both comprehensive written and oral examinations. For more information on the CMI Professional Designation, please visit our website, [www.ipt.org](http://www.ipt.org), and follow the links under “Professional Designations.”

If you have questions about the CMI Professional Designation that are not answered on our website, please contact Emily Archer, Certification Officer, at [earcher@ipt.org](mailto:earcher@ipt.org).
Congratulations to the following thirty-two IPT members who recently successfully completed the examination requirement for earning the CMI designation in Sales Tax at IPT’s Sales Tax Symposium held in Monterey, California.

Our Newest CMI Designates

Samantha Beasley, CMI
Didier Consultants, Inc.

Rebecca Cerna, CMI
Aviat U.S. Inc.

Cassie Chan, CMI
PricewaterhouseCoopers LLP

Katherine El-Eid, CMI
U.S. Bank

Joseph E. Evans, CMI
The Boeing Company

Samantha Farley-Thompson, CMI
BlueLinx Corporation

Cheryl A. Fields, CMI, CPA
The Wendy's Company

Jana Gradeva, CMI
BKD, LLP

Christopher Harris, CMI
Deloitte Tax LLP

Carlos V. Hernandez, CMI
General Electric Capital Corp.

Bobby Ho, CMI
Sony Corporation of America

Erin Kirsch, CMI
Ernst & Young LLP

Joshua A. Korus, CMI, CPA
Ernst & Young LLP

Trevor Kvarnlov, CMI
KPMG LLP

D. Gerard LeBlanc, Jr., CMI
Didier Consultants, Inc.

David R. MacMillan, CMI
Foss Holdings Inc.

Nicholas John Marshall, CMI
Baker Tilly Virchow Krause, LLP

Jeff McGhehey, CMI
The Home Depot

Debra Moye, CMI
Florida Power & Light (FP&L)/NextEra Energy, Inc.

Mayur Naik, CMI
Deloitte Tax LLP

Katherine Parrish, CMI
BSI Healthcare Audit Services, LLC

Jasmine L. Parris-Tate, CMI
Ernst & Young LLP

Tomas Presley, Jr., CMI
Air Liquide USA LLC

Jeremy K. Richmond, CMI
Xcel Energy

Rosa Salvador, CMI
Ernst & Young LLP

Lauren H. Stinson, CMI
Windward Tax, Inc.

Brian Mark Tan, CMI
PricewaterhouseCoopers LLP

Loridonna Tewmey, CMI, CPA
Bridgestone Americas

Sandra Thomas, CMI, CPA
BillSoft, Inc.

Kathryn L. Wagner, CMI
Deloitte Tax LLP

Thomas A. Walsh, CMI
Advance Finance Group LLC

Terue Yoshihara, CMI
Microsoft Corporation
Please check IPT's online Calendar of Events for additional programs that may be added.

### 2013 Calendar of Events

**Georgia One-Day Tax Seminar**  
The Westin Atlanta Perimeter North  
Atlanta, Georgia  
November 1, 2013

**CMI - Property Tax Exams**  
Renaissance Esmeralda Hotel  
Indian Wells, California  
November 2 - 3, 2013

**CMI - Income Tax Exams**  
Renaissance Esmeralda Hotel  
Indian Wells, California  
November 2 - 3, 2013

**Property Tax Symposium**  
Renaissance Esmeralda Hotel  
Indian Wells, California  
November 3 - 6, 2013

**Income Tax Symposium**  
Renaissance Esmeralda Hotel  
Indian Wells, California  
November 3 - 6, 2013

**23rd Annual Ohio Tax Conference**  
Hyatt Regency Hotel  
Columbus, Ohio  
January 28 - 29, 2014

**Other Meetings**

**Texas Taxpayers and Research Association (TTARA)**  
AT&T Conference Center  
Austin, Texas  
November 13 - 14, 2013

**NYU Institute on State and Local Taxation**  
The Grand Hyatt  
New York, New York  
December 12-13, 2013

### 2014 Calendar of Events

**Sales Tax School I**  
Georgia Tech Hotel and Conference Center  
Atlanta, Georgia  
February 23 - 28, 2014

**ABA-IPT Advanced Income Tax Seminar**  
The Ritz Carlton  
New Orleans, LA  
March 31 - April 1, 2014

**ABA-IPT Advanced Sales/Use Tax Seminar**  
The Ritz Carlton  
New Orleans, LA  
April 1 - 2, 2014

**ABA-IPT Advanced Property Tax Seminar**  
The Ritz Carlton  
New Orleans, LA  
April 3 - 4, 2014

**Sales Tax School II**  
Marriott Kingsgate Conference Center  
Cincinnati, Ohio  
April 27 - May 2, 2014

**Credits and Incentives School**  
Marriott Kingsgate Conference Center  
Cincinnati, Ohio  
May 14 - 16, 2014

**Basic State Income Tax School**  
Georgia Tech Hotel and Conference Center  
Atlanta, Georgia  
June 2 - 6, 2014

**Advanced State Income Tax School**  
Georgia Tech Hotel and Conference Center  
Atlanta, Georgia  
June 2 - 6, 2014

**CMI Sales Tax Exam**  
JW Marriott Desert Ridge  
Phoenix, AZ  
June 27 - 28, 2014

**CMI Income Tax Exam**  
JW Marriott Desert Ridge  
Phoenix, AZ  
June 28 - 29, 2014

**CMI Property Tax Exam**  
JW Marriott Desert Ridge  
Phoenix, AZ  
June 28 - 29, 2014

**38th Annual Conference**  
JW Marriott Desert Ridge  
Phoenix, Arizona  
June 29 - July 2, 2014

**Real Property Tax School**  
AT&T Executive Education Center  
Austin, Texas  
July 13 - 18, 2014

**Property Tax School**  
Georgia Tech Hotel and Conference Center  
Atlanta, Georgia  
August 10 - 14, 2014