



REGISTRATION PACKET, INCLUDING PRELIMINARY PROGRAM

2002 Intermediate Personal Property Tax School

UNIVERSITY OF GEORGIA ■ ATHENS, GEORGIA ■ OCTOBER 13-17, 2002



INSTITUTE FOR PROFESSIONALS IN TAXATION

One Capital City Plaza ■ 3350 Peachtree Road, NE, Suite 280 ■ Atlanta, Georgia 30326-1040
404-240-2300 ■ 404-240-2315 (fax) ■ ipt@ipt.org ■ www.ipt.org

Registration

Refer to Registration Form

Registrations must be completed in advance through the IPT office and are accepted on a first received basis. Enrollment is limited to companies with IPT members. PLEASE NOTE: If a faxed application received by IPT is accepted, and the person declines the acceptance, **there will be a \$100 cancellation penalty imposed**. Notification of acceptance will be sent out.

The University program/meals fee package (\$300 including tax) is to be sent to the Institute as part of the overall registration fee and includes breakfast on Monday through Thursday; lunches on Monday through Wednesday; dinner on Sunday, (Monday, Tuesday and Wednesday are open nights); refreshment breaks; and the student miscellaneous program/activities fees.

The total registration fee (including the university program/meals fee) for individuals who personally hold a membership in IPT is \$1,000 if payment is received by September 14, 2002.

There is an additional \$200.00 charge for individuals whose company has members in IPT, but the individual attending the school does not hold a membership in IPT. **In this case, the total registration fee would be \$1,200. If the registrant so elects, he or she may join as a property tax associate (company already has members) for the annual dues of \$225.00 (nonrefundable).**

For any payment received after September 14, 2002, there is a \$25 surcharge assessed. This includes faxed registration forms received prior to this date. A \$50.00 surcharge will be assessed if payment is not received by October 19, 2002.

All registrations must be paid in full within three weeks of acceptance and prior to the school. All fees must be in U.S. funds. The following credit cards can be used: American Express, VISA and MasterCard. In order for credit card to be processed, it is important that the information requested on the registration form be filled out completely. If the address on your registration form differs from the billing address for your credit card, you must provide IPT with the credit card billing address. Make check payable to: Institute for Professionals in Taxation, and remit to: One Capital City Plaza, 3350 Peachtree Road, NE, Suite 280, Atlanta, GA 30326-1040.

There is a **required orientation** for all students scheduled at 5:00 p.m. on Sunday, October 13, 2002.

Cancellation/ Substitution Policy

Refunds, subject to a cancellation charge of \$100, will be made upon written notification of cancellations received by October 4, 2002. No refunds will be made after October 4, 2002. There is also a substitution charge of \$40.00 before September 14, 2002, \$50 after that date (plus cost of delivery of any materials, etc.). Should you have any questions, please call (404) 240-2300.

Students are encouraged to use the IPT textbook **Property Taxation** as a reference resource and a supplement to classroom lectures. However, the book will not be used in the classroom. Purchase of the textbook is available through the IPT office. *Students need to bring a battery-operated calculator.* The registration desk will be open from 3:30 – 5:00 p.m. on Sunday, October 13. Registrants can pick up their materials at this time.

Photos will be taken at this event. These photos may be published in IPT publications, multimedia presentations, and on our website. Your attendance at this event, grants IPT the right to publish these photos.

General Information

CMI Designation – Property Tax

The Institute for Professionals in Taxation's designation, "Certified Member of the Institute" (CMI), is available to anyone who meets specific educational and experience requirements, and has been a property tax member of the Institute in good standing for at least one year. The purpose of IPT's professional designation program is to further the professional development of members. The major requirements are property tax administration experience, successful completion of IPT property tax schools and other educational courses or programs, and successful completion of both written and oral examinations. In order to meet the property tax school requirements, students must attend the entire program and successfully complete the school examination. With five years of eligible property tax experience, individuals may challenge up to one school by examination at a regularly scheduled time in lieu of attending the entire school. The CMI requirements and the CMI Candidacy Application can be downloaded from the IPT website at: www.ipt.org, or obtained by contacting the IPT office at 404-240-2300.

Continuing Education Credit

The Institute for Professionals in Taxation 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, Nashville, TN 37219-2417. Telephone: 615.880.4200. Website: www.nasba.org. Approximately thirty-two (32) continuing education credits are available for full attendance. In accordance with the standards of the National Registry of CPE Sponsors, CPE credits have been granted based on a 50-minute hour. CMIs will obtain credit on an hour to hour basis for attendance.

Registrants who wish to obtain credit from other organizations for the school must submit their own forms to the IPT office or utilize the standardized form provided by the Institute.

Prerequisites: Property Tax School or 3 years' or more property tax experience is recommended.

Program Level: Intermediate

Field of Study: Taxation

Transportation

Athens Municipal Airport, Ben Epps Field, is only 15 minutes away from the Georgia Center. Airline service between Athens and all major U.S. cities is available with connections through Charlotte, NC. **Air transportation between Atlanta and Athens is not available.** Local airport cab and limousine services are available from Atlanta's Hartsfield International Airport, which is one hour and thirty minutes from Athens. AAA Airport Shuttle, Inc. (1-800-354-7874) provides connecting service to and from Atlanta and the GA Center. \$30.00 per person one way. Contact them directly for a schedule.

A map, parking information and further details will be mailed to you with the university's confirmation. Directions may also be found at www.gactr.uga.edu/conferences/about/directions.phtml. A parking deck is located adjacent to the Center. In and out parking is available at \$8.00 per day. Vans and other vehicles over seven-feet tall cannot fit in the deck, but arrangements can be made for alternative parking. All of this information is provided for reference. There may be other transportation arrangements that are more preferable to your travel plans.

**Intermediate Personal Property
Tax School**

School Committee Chair

David H. LeVan, CMI

Vice Chair

Diane D. Brown, CMI

Instructors / Facilitators

Todd R. Barron, CMI

Director-Consulting Services
Advantax Management Corporation
St. Charles, Illinois

Shari K. Bowden, CMI

Senior Manager
DuCharme, McMillen & Associates, Inc.
Phoenix, Arizona

Diane D. Brown, CMI

Manager, Property Tax
Cooper Industries, Inc.
Houston, Texas

Joseph J. Calvanico, CMI, ASA

Manager - Property Taxes
General Electric Company
Atlanta, Georgia

David H. LeVan, CMI

President
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St. Charles, Illinois

Chris G. Muntifering, CMI

Senior Manager, Property Taxes
General Mills
Minneapolis, Minnesota

Kellianne M. Nagy

Manager - Global Property Taxes
Ford Motor Company
Dearborn, Michigan

Donald F. Nesci

Property Tax Manager
Kraft Foods North America, Inc.
Northfield, Illinois

Michelle Sutton

Senior Manager
Deloitte & Touche LLP
Nashville, Tennessee

Tommy L. Twomey, II, CMI

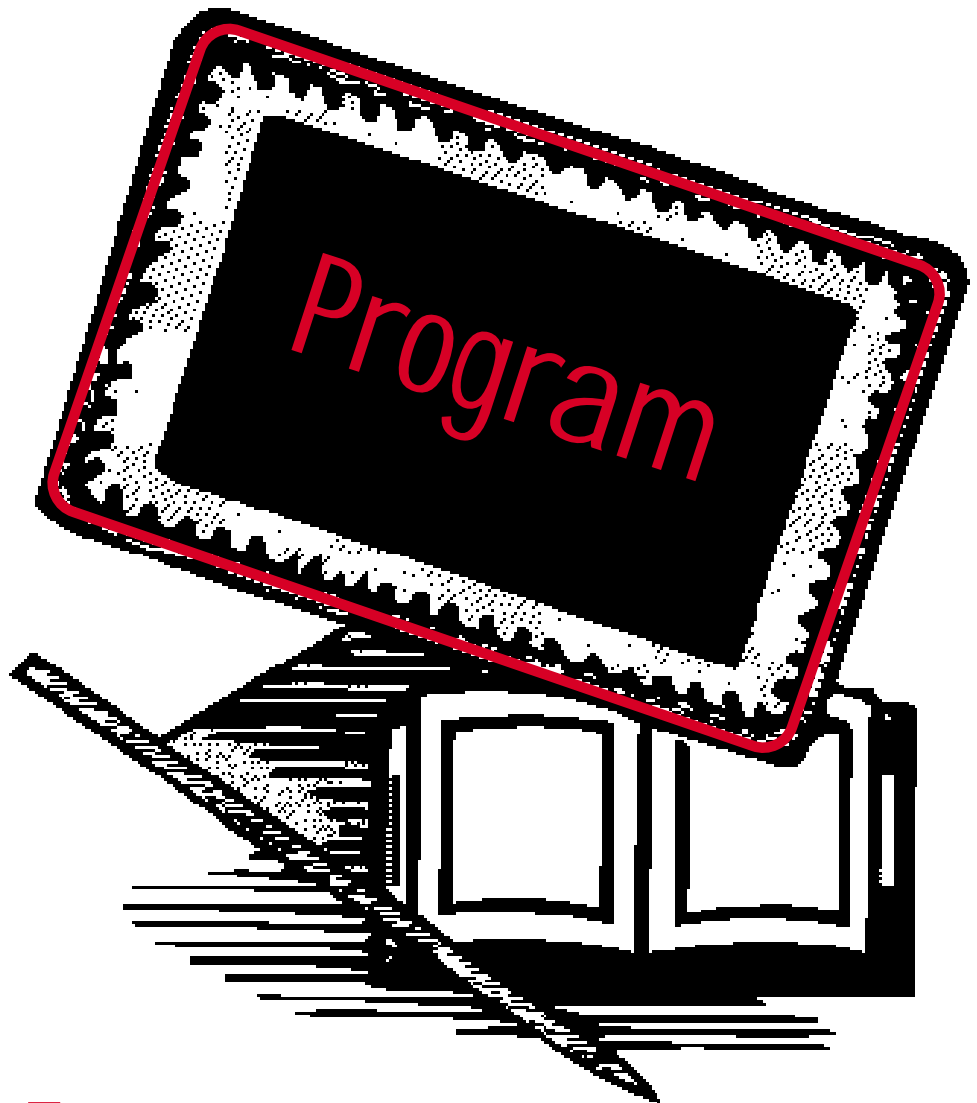
Senior Manager
PricewaterhouseCoopers LLP
Houston, Texas

Douglas T. Wilson, CMI

Chief Executive Officer
Tax Resource Network Inc.
Addison, Texas

**Overall Chair, Property Tax
Education**

Warren W. Schick, Sr., CMI



This is a comprehensive school which will provide an in-depth investigation of personal property taxation. It is designed for property tax personnel who have a basic knowledge of the property tax area. Completion of the Institute's basic Property Tax School or comparable experience/education is required. Emphasis is placed upon student participation and group discussion.

The Institute, founded in 1976, is dedicated to a high degree of professionalism with a strict Code of Ethics and Standards of Professional Conduct for its members, to uniform and equitable administration of ad valorem and sales & use taxes, and to minimizing the cost of tax administration and compliance.

2002 Intermediate Personal Property Tax School



SUNDAY, OCTOBER 13, 2002

- 3:30 - 5:00 pm **Registration**
- 5:00 pm **Mandatory Student Orientation**
- Brief Highlights of IPT**
Thomas J. Kuder, CMI
President
Institute for Professionals in Taxation
- Course Introduction**
David H. LeVan, CMI
Program Chair
2002 Intermediate Personal Property Tax School
- Objectives of Course and Introduction to the Material**
- 6:00 - 7:00 pm **Concurrent Breakout Sessions**
Students will be divided into four groups and will actively participate in the session.
- 7:00 pm **Get-Acquainted Informal Dinner/Hospitality**
 All registrants are expected to attend

MONDAY, OCTOBER 14, 2002

- 7:00 - 7:45 am **Buffet Breakfast**
- 8:00 - 10:00 am **DISCOVERY**
- 10:00 am-12:30 pm **LISTING**
- 12:30 - 1:30 pm **Lunch**
- 1:30 - 2:45 pm **Concurrent Workshop Sessions**
- 3:00 - 5:00 pm **VALUATION**
Depreciable Personal Property

Dinner is on your own for Monday, Tuesday and Wednesday evenings. Refer to the restaurant guide.

TUESDAY, OCTOBER 15, 2002

- 7:00 - 7:45 am **Buffet Breakfast**
- 8:00 - 8:30 am **Exam/ Review**
- 8:45 - 9:45 am **Concurrent Workshop Sessions**
- 10:00 am - 12:00 pm **VALUATION**
Advanced Depreciation Concepts
- 12:00 Noon - 1:00 pm **Lunch**
- 1:00 - 2:30 pm **VALUATION**
Advanced Depreciation Concepts (Continued)
- 2:45 - 4:00 pm **Concurrent Workshop Sessions**
- 4:15 - 5:30 pm **VALUATION**
Inventory, Leased Equipment, Intangibles



WEDNESDAY, OCTOBER 16, 2002

- 7:00 - 7:45 am **Buffet Breakfast**
- 8:00 - 8:30 am **Exam/ Review**
- 8:45 - 9:45 am **Concurrent Workshop Sessions**
- 10:00 - 11:15 am **RECONCILIATION**
- 11:15 am-12:15 pm **AUDITS**
- 12:15 pm- 1:15 pm **Lunch**
- 1:15 - 2:15 pm **Concurrent Workshop Sessions**
- 2:30 - 3:30 pm **APPEALS**
- 3:30 - 4:00 pm **Exam/Review**
- 4:00 - 6:00 pm **Course Review**



THURSDAY, OCTOBER 17, 2002

- 7:00 - 7:45 am **Buffet Breakfast**
- 8:00 - 9:30 am **Concurrent Workshop Sessions - by Industry**
Financial/Leasing
Utility
Heavy Equipment
Light Manufacturing
Retail
- 10:00- 12:00 pm **Final Exam**
- 12:00 Noon **Course Concludes**