

# A prime opportunity to ask state tax questions of Florida DOR representatives

The State Tax Conference brings you:

- Top-notch, quality education
- The “best and brightest” speakers nationally and internationally
- Updates you can take back to the office



## STATE TAX CONFERENCE

January 31-February 1, 2002

Orlando

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“The quality of speakers and topics covered guarantees our firm will have several CPAs in attendance.”

— Stacy Hopper, CPA  
Supervisor, State & Local Tax  
Lattimore, Black, Morgan & Cain, PC  
Nashville, Tennessee

Sponsored by the FICPA, The Florida Bar Tax Section,  
the Florida Department of Revenue and  
the Institute for Professionals in Taxation.



# What the State Tax Conference is about...

The 2002 State Tax Conference provides great education and networking opportunities with fellow CPAs, attorneys, industry representatives, tax professionals, and key Department of Revenue (DOR) personnel. The conference will include current events; updates on Florida tax and legislative matters; hot topics in the national, state, and local arenas; and relevant state and local tax issues on various industry segments. This is a premier conference that you will not want to miss.

This conference is sponsored by the FICPA, The Florida Bar Tax Section, the Florida Department of Revenue and the Institute for Professionals in Taxation.

## Conference Schedule

### Wednesday, January 30, 2002

6:00-7:30 p.m.

**Welcome Reception**

### Thursday, January 31, 2002

7:30-8:00 a.m.

**Registration and Continental Breakfast**

8:00-8:10 a.m.

**Introduction and Opening Remarks**

8:10-9:00 a.m.

**Florida Legislation and Litigation Update (50 TB)**

**Lisa Echeverri**

Director of Legislative and Cabinet Services  
Florida Department of Revenue  
Tallahassee

**Jerry Murchison**

Assistant Attorney General  
Chief, Tax Section  
State of Florida, Office of the Attorney General  
Tallahassee

**Kevin ODonnell**

Assistant General Counsel  
Florida Department of Revenue  
Office of General Counsel  
Tallahassee

**Marshall C. Stranburg**

Deputy General Counsel  
Florida Department of Revenue  
Office of General Counsel  
Tallahassee

Want to be an authority on the latest developments in Florida? This presentation will include highlights from the past legislative session, the Florida Department of Revenue's package for the 2002 legislative session, recent case developments, and other informative topics presented by a panel of experts from the Florida Department of Revenue and the Florida Attorney General's Office.

### CPE and CLER Credit

This conference qualifies for 1 Accounting & Auditing (AA) hour and 15 Technical Business (TB) hours of CPE credit, subject to approval by the Florida Board of Accountancy. This conference has been approved by The Florida Bar for 16 hours of general CLER credit, 16 hours toward tax certification and 8 hours toward business litigation certification. This conference qualifies for 16 hours of CPE credit for IPT members.

9:00-9:50 a.m.

**Audit Compliance in a Paperless Environment (50 AA)**

**John Keda**

Regional Manager, Out of State Offices  
Florida Department of Revenue  
Hillside, Illinois

**Will Yancey, PhD, CPA**

Consultant  
Will Yancey, PhD, CPA  
Dallas

*Obtaining and verifying completeness of electronic data files is a chronic problem for both auditors and taxpayers. This panel will discuss Florida DOR requirements and practical solutions.*

10:10-11:00 a.m.

**National Update - Cases and Legislation (50 TB)**

**Elizabeth C. Burton, CPA, Esq.**

National Coordinator of State and Local Taxes  
Grant Thornton LLP  
Chicago

**Frank G. Julian, Esq.**

Operating VP/Tax Counsel  
Federated Department Stores  
Cincinnati

**Marilyn A. Wethekam, Esq.**

Partner  
Horwood Marcus & Berk  
Chicago

*What were they thinking? A national update of cases and litigation, most significant and some just off-the-wall.*

11:00-11:50 a.m.

**State Tax Traps to Avoid (50 TB)**

**William McConnell**

State Tax Counsel  
General Electric Company  
Ft. Myers

*This session will identify the most important state tax traps facing practitioners in Florida and other states.*

**11:50 a.m.-12:50 p.m.**

**Lunch with Presentation: Streamlined Sales Tax Project (25 TB)**

**Harley T. Duncan**

Executive Director  
Federation of Tax Administrators  
Washington, D.C.

*It's make-or-break time on the remote sales and sales tax simplification front. This presentation will review the states' efforts to design and enact a streamlined sales tax administration system.*

**12:55-1:45 p.m.**

**Taking Control of Sales and Use Tax Processes and Data (50 TB)**

**Mark S. Camarata, CMI**

Director, State and Local Taxes  
Eastman Kodak Company  
Rochester, New York

**Richard Inclima**

Director of Tax Technology  
Eastman Kodak Company  
Rochester, New York

**1:45-2:35 p.m.**

**Florida's Compliance and Enforcement Initiatives (50 TB)**

**Jim Evers**

Director, General Tax Administration  
Florida Department of Revenue  
Tallahassee

**Jim Johnson**

Process Manager  
Florida Department of Revenue  
Tallahassee

*The DOR has expanded its initiative in the areas of eAuditing and Statistical Sampling. Through the development of a WINFMT software program and training of audit staff, the DOR now has the ability to conduct audits in an electronic environment. Auditing in this environment has advantages to the taxpayer and the Department. It produces tremendous time savings for both parties, and the results are more precise and definitive for both.*

**2:55-3:45 p.m.**

**Valuation of Intellectual Property for State Income Tax Purposes (50 TB)**

**William M. Backstrom Jr., Esq.**

Partner  
Jones, Walker, Waechter, Poitevent, Carriere & Denegre, LLP  
New Orleans

*This session will address the importance of valuing intangible property for income tax purposes. In addition, the program will address methodologies for valuing and inventorying intangible property.*

**3:45-4:35 p.m.**

**E-Commerce Update (50 TB)**

**Art Rosen**

Partner  
McDermott, Will & Emery  
New York

**Robert S. Goldman**

Partner  
Vickers Madsen & Goldman, LLP  
Tallahassee

*E-Commerce is having a profound effect not only on the world's economy and the manner in which businesses operate and interact, but also on virtually every aspect of state and local taxation. After identifying the relevant issues and recent developments, this panel will focus on two key concerns to taxpayers and their representatives: what is likely to happen in this area in the future, and what businesses can do to minimize any potential negative tax implications.*

**4:40-6:00 p.m.**

**Reception**

**Friday, February 1, 2002**

**7:30-8:00 a.m.**

**Continental Breakfast**

**8:00-9:40 a.m.**

**Select National Hot Buttons (100 TB)**

**Paul H. Frankel, Esq.**

Partner  
Morrison & Foerster  
New York

**Richard D. Pomp, JD**

Professor of Law  
University of Connecticut School of Law  
Hartford, Connecticut

*Watch these nationally known experts discuss and debate U.S. Supreme Court cases, Nexus issues, discrimination, stolen refunds, taxation without factor representation, and business/nonbusiness issues.*

**10:00-11:15 a.m.**

**The State of the States (75 TB)**



**Gerald H. Goldberg**

Executive Officer  
California Franchise Tax Board  
Sacramento, California



**Ruth E. Johnson**

Commissioner  
Tennessee Department of Revenue  
Nashville



**James A. Zingale, PhD**

Executive Director  
Florida Department of Revenue  
Tallahassee

*This must-see presentation given by state revenue commissioners will discuss emerging issues in states, including Florida, that are important to Florida practitioners.*

**11:15-11:45 a.m.**

## **Tax Reform in Florida and Other Burning Legislative Issues (30 TB)**

**Vicki Weber**

Partner  
Steel Hector & Davis LLP  
Tallahassee

*Fundamental tax reform is needed more than ever in Florida. This presentation will consider both why it is necessary and what the obstacles are to it occurring in the short term; review the lessons learned in the 1987 experiment with a tax on services; identify industries – such as telecommunications and electric utility industries – most likely to experience tax reform; and consider discrete opportunities for simplifying and reforming taxes in the near term.*

**11:45 a.m.-12:45 p.m.**

## **Lunch with Presentation: How Economic Conditions/Forecasts Affect Tax Policy (20 TB)**

**William F. Fox**

Professor, Department of Economics  
Director, Center for Business & Economic Research  
The University of Tennessee  
Knoxville, Tennessee

**12:50-1:40 p.m.**

## **State Taxation of Pass-Through Entities (50 TB)**

**Karen J. Boucher**

Principal  
Andersen LLP  
Milwaukee

*Pass-through entities provide significant planning opportunities for multistate corporations. This topic provides an overview of entity taxation, classification conformity, significant recent developments and planning strategies.*

**1:40-2:30 p.m.**

## **Florida Taxation of Manufacturing and Technology (50 TB)**

**Linda Bridges**

Revenue Program Administrator  
Florida Department of Revenue  
Tallahassee

**James M. Ervin Jr.**

Partner  
Holland & Knight LLP  
Tallahassee

**Tom Moore**

Harris Corp.  
Melbourne

*The session is a panel discussion and update of exemptions and credits and the application of tax to manufacturers and emerging technologies. The presentation will discuss the latest in “gimmies” and “gotchas” in this area.*

**2:50-3:40 p.m.**

## **Florida Update and Select Practice Topics (50 TB)**

**Glenn Bedonie**

Director of Technical Assistance and Dispute Resolution  
Florida Department of Revenue  
Tallahassee

**Linda Bridges**

Revenue Program Administrator  
Florida Department of Revenue  
Tallahassee

**Joe Mellichamp**

Shareholder  
Carlton Fields, PA  
Tallahassee

**Joe Parramore**

Revenue Program Administrator  
Florida Department of Revenue  
Tallahassee

**Mark Zych**

Revenue Program Administrator  
Florida Department of Revenue  
Tallahassee

Hear from a group of technical experts from Technical Assistance and Dispute Resolution in the Florida DOR and the former Chief of the Tax Section of the Attorney General's Office as they discuss current issues arising from protested cases, Technical Assistance Advisory requests and rulemaking activities.

*“I especially enjoyed the discussions of court cases from several states on the same tax issue. It was a great opportunity to create or enhance working relationships with taxpayers and representatives.”*

– Kathi Marsh,  
Tax Law Specialist, CPA  
Florida Department of Revenue  
Tallahassee

**REGISTER EARLY!**

Take advantage of the Advance Registration fee when your registration is received by the FICPA more than 7 days before the course date.

2001-2002

## State Tax Conference Committee

*(A joint committee from the FICPA State Tax Section,  
The Florida Bar Tax Section, the Florida Department of Revenue and  
the Institute for Professionals in Taxation)*

### Kevin J. Lockwood, Conference Chairman

Glenn A. Bedonie	Marshall C. Stranburg
Joe Handy	William D. Townsend
Kevin J. Herzberg	Cass D. Vickers
Joe Moffa	

## Conference Site

### Caribe Royale Resort Suites & Villas

8101 World Center Drive  
Orlando, FL 32821  
(407) 238-8000

FICPA Room Rate: \$189 Queen Double or Standard King  
Hotel Cutoff Deadline: **January 3, 2002**  
*(Reservations made after the cutoff date will be subject  
to availability and current room rate.)*

Please call the hotel directly at (407) 238-8000  
to reserve your room, and remember to mention the  
FICPA to receive the special group rate.



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