

Institute for Professionals in Taxation

Preliminary Program



Georgia Tech Hotel and Conference Center
Atlanta, Georgia — October 19 - 23, 2003



Faculty:

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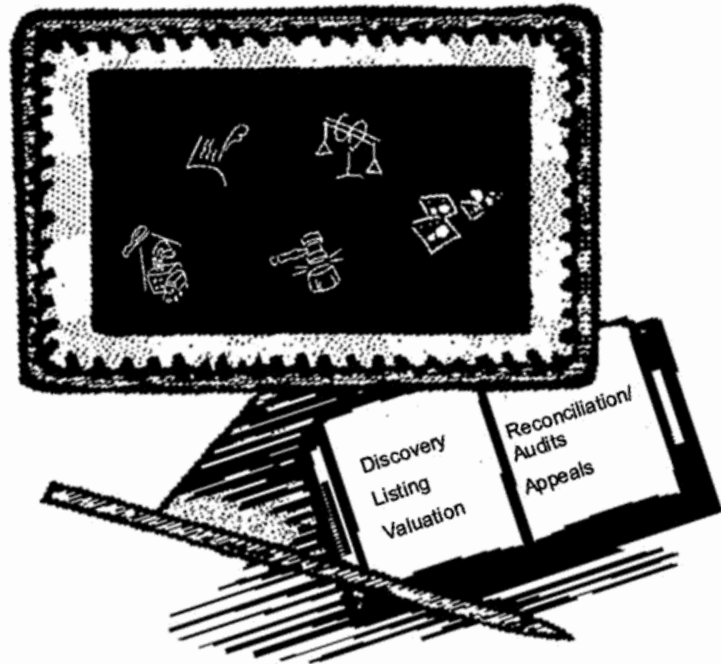
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Dearborn MI

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Northfield, IL

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PricewaterhouseCoopers LLP
Houston, TX

Douglas T. Wilson, CMI
Chief Executive Officer
Tax Resource Network Inc.
Dallas, TX



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 Standard 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.

**2003 Intermediate Personal Property Tax School — Preliminary Program
Georgia Tech Hotel and Conference Center • Atlanta, Georgia
October 19 - 23, 2003**

SUNDAY, OCTOBER 19, 2003

3:00 - 4:30 pm	Registration
4:30 pm	Mandatory Student Orientation
	Brief Highlights of IPT
	Richard V. Carlson, CMI, CPA President Institute for Professionals in Taxation
	Course Introduction
	David H. LeVan, CMI Program Chair 2003 Intermediate Personal Property Tax School
	Objectives of Course and Introduction to the Material
(To follow Immediately after the Orientation)	Concurrent Breakout Session — Number 1 Students will be divided into four groups and will actively participate in the session. Refer to registration list for Group Assignment. Color- coded badges designate groups.
7:00 pm	Get Acquainted Informal Dinner Informal hospitality, prior to dinner, begins when the session concludes. All registrants are expected to attend.

MONDAY, OCTOBER 20, 2003

7:00 - 7:45 am	Buffet Breakfast
8:00 - 9:30 am	Discovery
9:45 - 12:00 pm	Listing
12:00 - 1:00 pm	Buffet Lunch
1:00 - 2:00 pm	Concurrent Breakout Session — Number 2
2:15 - 4:15 pm	Valuation Machinery and Equipment Depreciable Personal Property
4:30 - 5:00 pm	Concurrent Breakout Session — Number 3
5:00 - 10:00 pm	Study Hall open
6:00 - 10:00 pm	Dinner (Available in Main Dining Room)

TUESDAY, OCTOBER 21, 2003

7:00 - 7:45 am	Buffet Breakfast
8:00 - 8:30 am	Exam/Review
8:30 - 9:30 am	Concurrent Breakout Session — Number 4
9:45 - 11:15 am	Valuation Inventory and Leased Equipment
11:30 am - 12:30 pm	Buffet Lunch
12:30 - 3:15 pm	Valuation Advanced Depreciation Concepts
3:30 - 5:00 pm	Concurrent Breakout Session — Number 5
5:00 - 10:00 pm	Study Hall Open
6:00 - 10:00 pm	Dinner (Available in Main Dining Room)

WEDNESDAY, OCTOBER 22, 2003

7:00 - 7:45 am	Buffet Breakfast
8:00 - 8:30 am	Exam/Review
8:30 - 9:15 am	Concurrent Breakout Session — Number 6
9:30 - 11:00 am	Reconciliation
11:00 am-12:00 pm	Audits
12:00 - 1:00 pm	Buffet Lunch
1:00 - 2:00 pm	Concurrent Breakout Session — Number 7
2:00 - 2:30 pm	Appeals
2:30 - 3:00 pm	Exam/Review
3:15 - 4:00 pm	Concurrent Breakout Session — Number 8
4:15 - 5:30 pm	Group Case Study Presentations
5:30 - 10:00 pm	Study Hall open
6:00 - 10:00 pm	Dinner (Available in Main Dining Room)

THURSDAY, OCTOBER 23, 2003

7:00 - 7:45 am	Buffet Breakfast
8:00 - 8:30 am	Case Study Rulings
8:30 - 10:30 am	Course Review
10:45 - 12:00 Noon	Final Exam
12:00 Noon	Course Concludes



Registrations must be submitted in advance through the IPT office and are accepted on a first received basis. Enrollment is limited to IPT members or employees of companies that have members in IPT; and to employees of state and local governments. **PLEASE NOTE:** If a faxed application received by IPT is accepted (acceptance letters will be sent by September 19, 2003), and the person declines the acceptance, there will be a \$100 cancellation penalty imposed. There will also be a substitution fee if someone other than the original applicant attends.

In order to encourage early registration, registration fees (U.S. funds) are:

Payments received by September 19, 2003*:

\$700 (Individual personally holding membership in IPT)

\$900 (Individual does not hold membership, but company/firm has members in IPT; and also including employees of state and local governments)

Payments received after September 19, 2003*:

\$725 (Individual personally holding membership in IPT)

\$925 (Individual does not hold membership, but company/firm has members in IPT; and also including employees of state and local governments)

*For any payment received after September 19, 2003, there is a \$25.00 surcharge assessed. This includes faxed registration forms received without payment prior to this date.

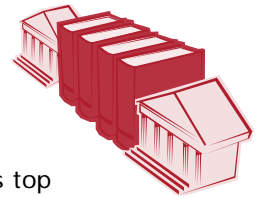
As indicated above, there is an additional \$200 charge for individuals whose company has members in IPT, but the individual attending the school does not hold a membership in IPT. In this case, the total school fee would be \$900. If the registrant so elects, he/she may join as an Associate Member (company already has members) for annual dues payment of \$225 (nonrefundable), and will be eligible for the reduced school fee of \$700. Please see registration form. There is also a \$360 supplemental registration fee for registrants not staying at the Georgia Tech Hotel and Conference Center under IPT's group rate. (See hotel information.)

All registrations must be paid in full within three weeks of acceptance and prior to the school (a \$25 surcharge applies to any payment received after September 19, 2003; \$50 surcharge applies if payment is still outstanding as of October 23, 2003.) All fees must be in U.S. funds. The following credit cards can be used: American Express, VISA and Master Card. 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.

Cancellation/Substitution Policy

Refunds, subject to a cancellation charge of \$100, will be made upon written notification of cancellations received by October 10, 2003. There is also a substitution charge of \$40 before September 19, 2003, \$50 after that date (plus cost of delivery of materials, etc., and, **any fee increase due to membership differential**). Should you have any questions, please call 404.240.2300.

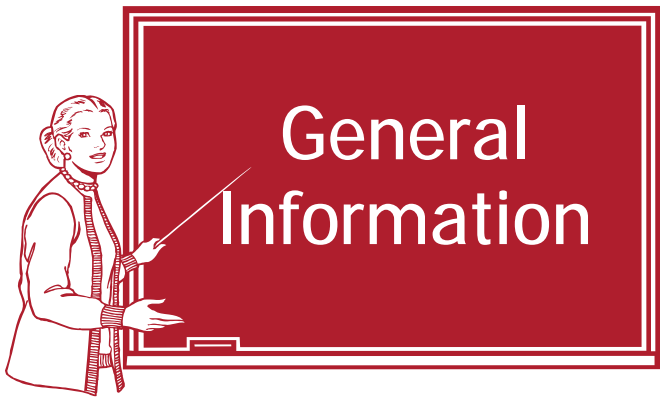
The Georgia Institute of Technology



Georgia Tech is one of the nation's top research universities, distinguished by its commitment to improving the human condition through advanced science and technology. Georgia Tech's campus occupies 330 acres in the heart of the vibrant, progressive city of Atlanta, where more than 15,000 undergraduate and graduate students receive a focused, technologically based education.

The Institute offers many nationally recognized, top-ranked programs. Undergraduate and graduate degrees are offered in the Colleges of Architecture, Engineering, Sciences, Computing, Management, and the Ivan Allen College of Liberal Arts. Students learn from world-class teachers and scholars working at the frontiers of science and technology. Georgia Tech researchers are developing new vaccines and cures for diseases; designing sophisticated new prosthetic limbs for land mine victims; studying development and transportation patterns to improve regional air quality; and providing policy leadership to reduce the global threat posed by weapons of mass destruction.

The Institute consistently ranks among *U.S. News & World Report's* top ten public universities in the United States; it also consistently ranks as a top producer of African-American engineers. In a world that increasingly turns to technology for solutions, Georgia Tech is using innovative teaching and advanced research to define the technological university of the 21st century.



The IPT registration desk will be open from 3:00—4:30 p.m. on Sunday, October 19, 2003. Registrants can pick up their materials at this time.

There is a required orientation for all students scheduled for 4:30 p.m. on Sunday, October 19, 2003.

Students need to bring a battery-operated calculator, scratch pads, pencils, pens, etc. A notebook will be supplied that contains all of the school reference materials. Attendance will be recorded for CPE purposes. Attire during the day is business casual. While the entire hotel and meeting complex are enclosed, clothing appropriate for the season should be brought for any out-of-doors activities contemplated by the Registrant.

Quizzes will be given during the week, with a final quiz on Thursday. A cumulative passing score must be realized on the quizzes for successful completion of the school. The final quiz must be taken Thursday at the scheduled time, so travel arrangements should be made accordingly. **No exceptions can be made to taking the quiz at the stated time on Thursday.**

Photos will be taken at this event to use in publications, on the IPT website, and photo albums.

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 requirements, has five years of property tax experience, and has been a property tax member of the Institute in good standing for at least one year. The educational requirements to achieve the CMI Property Tax professional designation include successful completion of any two of the following IPT property tax schools: 1) Property Tax School (basic), 2) Intermediate Personal Property Tax

School, 3) Intermediate Real Property Tax School. Finally, successful completion of both the written and oral CMI examinations is required. The CMI requirements and the CMI Candidacy Application can be downloaded from the IPT website at: www.ipt.org, or you may contact 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. Web site www.nasba.org. Approximately thirty-one (31) 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 the Institute.

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

Program Level: Basic

Field of Study: Taxation (Property Tax)

School Committee

Chair:

David H. LeVan, CMI

Vice-Chair:

Diane D. Brown, CMI

Overall Chair,

Property Tax Education:
Warren W. Schick, Sr., CMI