

Institute for Professionals in Taxation

Preliminary Program



**Georgia Tech Hotel and Conference Center
Atlanta, Georgia — October 24 - 28, 2004**



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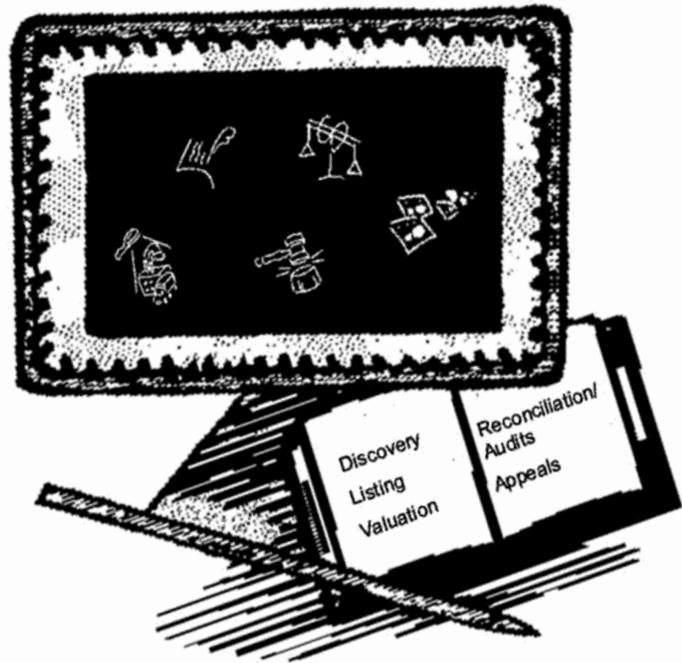
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Douglas T. Wilson, CMI
Chief Executive Officer
Tax Resource Network, Inc.
Dallas, TX



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.

2004 Intermediate Personal Property Tax School — Preliminary Program
Georgia Tech Hotel and Conference Center • Atlanta, Georgia
October 24 - 28, 2004

SUNDAY, OCTOBER 24, 2004

3:00 - 4:30 pm	Registration
4:30 pm	Mandatory Student Orientation
	Brief Highlights of IPT
	Warren W. Schick, Sr., CMI President Institute for Professionals in Taxation
	Course Introduction
	David H. LeVan, CMI Program Chair 2004 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.
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 25, 2004

7:00 - 7:45 am	Buffet Breakfast (Guests of Hotel)
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 - 5:30 pm	Concurrent Breakout Session — Number 3
5:30 - 10:00 pm	Study Hall open
6:00 - 9:00 pm	Dinner (Guests of Hotel) (Available in Main Dining Room)

TUESDAY, OCTOBER 26, 2004

7:00 - 7:45 am	Buffet Breakfast (Guests of Hotel)
8:00 - 8:30 am	Quiz/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 - 9:00 pm	Dinner (Guests of Hotel) (Available in Main Dining Room)

WEDNESDAY, OCTOBER 27, 2004

7:00 - 7:45 am	Buffet Breakfast (Guests of Hotel)
8:00 - 8:30 am	Quiz/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	Quiz/Review
3:15 - 4:00 pm	Concurrent Breakout Session — Number 8
4:00 - 6:00 pm	Group Case Study Presentations
6:00 - 10:00 pm	Study Hall open
6:00 - 9:00 pm	Dinner (Guests of Hotel) (Available in Main Dining Room)

THURSDAY, OCTOBER 28, 2004

7:00 - 7:45 am	Buffet Breakfast (Guests of Hotel)
8:00 - 9:00 am	Case Study Rulings
9:00 - 10:30 am	Course Review
10:45 - 12:30 pm	Final Quiz
12:30 pm	Course Concludes

Registration Information

Registrations must be submitted in advance through the IPT office and are accepted on a first received basis. There will be a maximum number of registrants accepted per company. 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 24, 2004), 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 24, 2004*:

\$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 24, 2004*:

\$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 24, 2004, 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 24, 2004; \$50 surcharge applies if payment is still outstanding as of October 28, 2004.) 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: 600 Northpark Town Center, 1200 Abernathy Road, NE, Suite L-2, Atlanta, GA 30328.

Cancellation/Substitution Policy

Refunds, subject to a cancellation charge of \$100, will be made upon written notification of cancellations received by October 15, 2004. There is also a substitution charge of \$40 before September 24, 2004, \$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.

Accommodations

The Georgia Tech Hotel and Conference Center is located at 800 Spring Street, Atlanta, GA, 30308. The rate is \$756 (includes applicable tax) for the four night stay Sunday through Wednesday, and the hotel accepts all major credit cards. For those arriving before Sunday or staying Thursday, the daily charge is \$119 plus all applicable taxes.

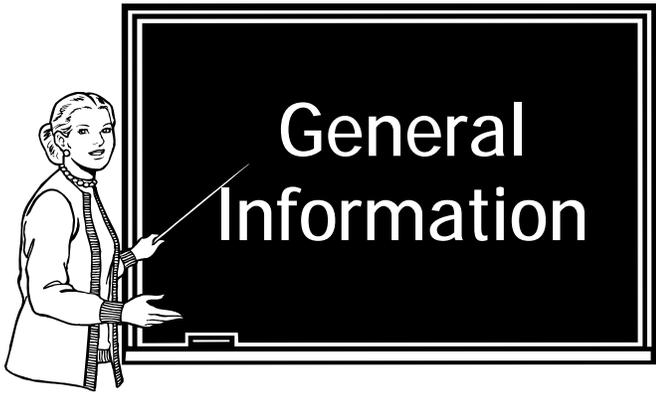
For one occupant the room package rate of \$756 provides for four full breakfasts, three lunches, four dinners, refreshment breaks and the daily participant fee.



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.

Georgia Tech 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. It consistently ranks among *U.S. News & World Report's* top ten public universities in the United States. 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 24, 2004. 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 24, 2004.

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.

Students are encouraged to use the IPT textbook, *Property Taxation*, 3rd Edition, as a reference resource and a supplement to classroom lecture. Supplemental reading assignments may be given; however, the book will not be used in the classroom. Purchase of the textbook is available through the IPT office. A faxable order form can be downloaded from IPT's website at <http://ipt.org/TaxResources/PublicationsOrderForm.pdf>. Members can purchase the book on line at IPT's website by logging on to the members only section.

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, or 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. 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 by the Institute. For more information regarding administrative policies such as complaint and refund, please contact our office at (404) 240-2300.

Prerequisites:	Property Tax School or three years or more property tax experience is recommended
Program Level:	Intermediate
Field of Study:	Taxation (Property Tax)
Instructional Method:	Group Live

School Committee

Chair:

David H. LeVan, CMI

Vice-Chair:

Diane D. Brown, CMI

Overall Chair,

**Property Tax Education:
Anthony R. Thompson, CMI**