

A&A CPE credit hours available as well as CLER!

**NEW  
CITY!**



# STATE TAX CONFERENCE

February 5-6, 2004  
Tampa

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Register for the 2004 State Tax Conference for:

- Numerous state tax expert speakers
- Breakout sessions tailored to CPAs and attorneys
- The most current state tax updates

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 2004 State Tax Conference provides great education and networking opportunities with fellow CPAs, attorneys, industry representatives, tax professionals, and key Florida Department of Revenue 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 co-sponsored by The Florida Bar Tax Section, the Florida Department of Revenue and the Institute for Professionals in Taxation.

## Conference Schedule

### Wednesday February 4, 2004

**6:00-7:30 p.m.**  
**Welcome Reception**

### Thursday February 5, 2004

**7:30-8:00 a.m.**  
**Registration and Continental Breakfast**

**8:00-8:10 a.m.**  
**Introduction and Opening Remarks**  
**Mary Kossack**  
State Tax Conference Committee Chair

**8:10-9:25 a.m.**  
**Select National Hot Buttons (75 TB)**  
**Paul H. Frankel**  
Partner/Morrison & Foerster, LLP  
New York  
**Richard Pomp**  
Professor of Law/University of Connecticut  
Hartford, Connecticut

**9:40-11:20 a.m.**  
**Sarbanes-Oxley: Impact on the Florida Tax Professional (100 TB)**  
**Larry B. Quimby**  
Senior Tax Partner/PricewaterhouseCoopers LLP  
Philadelphia  
**Sherwin Simmons**  
Chair/Tax Group/Steel, Hector & Davis  
Miami  
**Sam Ullman**  
Attorney/Steel, Hector & Davis  
Miami  
**Gerard Weble**  
Senior Manager/Deloitte & Touche, LLP  
Tampa

**11:20 a.m.-12:20 p.m.**  
**Lunch**

**12:20-1:10 p.m.**  
**Alternative Funding for the State of Florida (50 TB)**

**Gene Adams**

Consultant  
Tallahassee

**Lloyd "Buddy" Turman, CAE**

CEO-Executive Director/Florida Institute of CPAs  
Tallahassee

**Vicki Weber**

Shareholder/Hopping Green & Sams, PA  
Tallahassee

**1:15-2:05 p.m.**  
**Concurrent Breakouts – Choose One**

**Breakout 1 Certified Audit (50 AA)**  
**David W. Jacobi, CPA\*/PFS, CFP, CFST**  
Partner/O'Sullivan Creel, LLP  
Pensacola  
**Kate Laughlin, CPA\*, CFST**  
Supervisor-Tax Department/  
O'Sullivan Creel, LLP  
Pensacola

**Breakout 2 Multi-State Non-Corporate Income Tax Issues (50 TB)**  
**William M. Backstrom Jr.**  
Partner/Jones Walker  
New Orleans  
**Frank Julian**  
Operating Vice President/  
Tax Counsel/Federated  
Department Stores  
Cincinnati

*\*Regulated by the State of Florida*

## *CPE and CLER Credit*

The credit earned depends on the concurrent breakouts chosen and subject to approval by the Florida Department of Business and Professional Regulation. CLER credit will be awarded by The Florida Bar. The number of credit hours is to be determined.

2:10-3:00 p.m.

### **Concurrent Breakouts – Choose One**

**Breakout 3 Florida Department of Revenue: Audit Sampling Procedures (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

**Breakout 4 State of the States (50 TB)**

**Loren L. Chumley**

Commissioner/Tennessee  
Department of Revenue  
Nashville, Tennessee

**Harley T. Duncan**

Executive Director/Federation of  
Tax Administration  
Washington, D.C.

**Robert K. Thompson**

Director of New Jersey Division of  
Taxation/State of New Jersey  
Trenton, New Jersey

**James A. Zingale, PhD**

Executive Director/Florida  
Department of Revenue  
Tallahassee

3:15-4:30 p.m.

### **Concurrent Breakouts – Choose One**

**Breakout 5 State of the Profession and the Florida Tax Professional (75 TB)**

**Frederick Brummer, CPA**

Representative/Florida House of  
Representatives  
Apopka

**Jennifer J. Green, CAE**

Director of Governmental  
Affairs/Florida Institute of CPAs  
Tallahassee

**Winston Howell, CPA**

Managing Partner/  
Thomas Howell Ferguson, PA  
Tallahassee

**Dominic Pino, CPA**

President/Florida Institute of CPAs,  
Partner/Pricewaterhouse  
Coopers LLP  
Ft. Lauderdale

**Breakout 6 Multi-State Corporate Tax Update (75 TB)**

**Mark Beshears**

Assistant Vice President/  
Sprint/State Tax Section  
Overland Park, Kansas

**Marilyn Wethekam**

Partner/Horwood Marcus &  
Berk, Chtd.  
Chicago

**Friday  
February 6, 2004**

7:30-8:00 a.m.

### **Continental Breakfast**

8:00-9:15 a.m.

**Florida Legislative and Litigation Update (75 TB)**

**Lisa R. Echeverri**

Deputy Executive Director/Florida Department  
of Revenue  
Tallahassee

**Jarrell L. "Jerry" Murchison**

Assistant Attorney General, Chief of the Tax  
Section/Office of the Attorney General  
Tallahassee

**Kevin J. ODonnell**

Chief Assistant General Counsel/General Tax  
Administration/Florida Department of Revenue  
Tallahassee

**Marshall C. Stranburg**

Deputy General Counsel/Florida Department  
of Revenue  
Tallahassee

9:30-10:20 a.m.

### **Concurrent Breakouts – Choose One**

**Breakout 7 Local Government Finances (50 TB)**

**Martha Haynie**

Comptroller/Orange County  
Comptroller's Office  
Orlando

**Breakout 8 The Proposed Federal Business Activities Tax Legislation (50 TB)**

**Steve Cordi**

Deputy Comptroller/Comptroller  
of the Treasury, State of Maryland  
Annapolis, Maryland

## *CMI Credit*

CMI's will receive hour for hour continuing education credits for actual session attendance upon submittal of the appropriate continuing education form.

### *Lisa R. Echeverri*

Deputy Executive Director/  
Florida Department of Revenue  
Tallahassee

### *Susan Haffield*

Partner/PricewaterhouseCoopers  
LLP

Minneapolis

### *Arthur R. Rosen*

Partner/McDermott, Will &  
Emery

New York

### *Marshall C. Stranburg*

Deputy General Counsel/  
Florida Department of Revenue  
Tallahassee

### *Steve Kranz*

Tax Counsel/Council On State Taxation  
Washington, D.C.

### *Randy Miller*

Governmental Consultant/Katz, Kutter,  
Alderman & Bryant, PA

Tallahassee

### *Rich Prem*

Director Global Indirect Taxes/Amazon.Com  
Seattle

### *Marshall C. Stranburg*

Deputy General Counsel/Florida Department  
of Revenue  
Tallahassee

**10:25-11:40 a.m.**

### **Florida Update & Select Practice Topics (75 TB)**

#### *Glenn Bedonie*

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

#### *Linda Bridges*

Revenue Program Administrator I/Florida  
Department of Revenue

Tallahassee

#### *Joe Parramore*

Revenue Program Administrator III/Florida  
Department of Revenue

Tallahassee

#### *Mark Zych*

Revenue Program Administrator I/Florida  
Department of Revenue

Tallahassee

**11:40 a.m.-12:40 p.m.**

**Lunch**

**12:40-2:20 p.m.**

### **Streamlined Sales Tax: Impact on Florida (100 TB)**

#### *Harley T. Duncan*

Executive Director/Federation of Tax  
Administration

Washington, D.C.

#### *Alan Jobansen*

Staff Director/Senate Finance and Taxation  
Committee/Florida Senate

Tallahassee

**2:40-3:30 p.m.**

### **Concurrent Breakouts – Choose One**

#### **Breakout 9 Unclaimed Property (50 AA)**

##### *Phillip Carlton*

Financial Administrator/Florida  
Department of Banking and  
Finance

Tallahassee

#### **Breakout 10 Tax Reform: Constitutional Provisions (50 TB)**

##### *Mark Eidman*

Attorney/Scott, Douglass &  
McConnico, LLP

Austin, Texas

**3:30-4:20 p.m.**

#### **E-Filing Opportunities with FDOR (50 TB)**

##### *Jim Evers*

Director of General Tax Program/Florida  
Department of Revenue

Tallahassee

You're invited to attend an orientation meeting of the State Tax Section, the FICPA's premier professional online community devoted exclusively to Florida state taxation accounting matters.

**February 4, 2004!**

For more information, visit

[www.ficpa.org/ficpa/sections/statetax](http://www.ficpa.org/ficpa/sections/statetax) –  
or to sign up now, e-mail [sections@ficpa.org](mailto:sections@ficpa.org).

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2003-2004

## State Tax Conference Committee

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

Mary Kossack, Conference Chair

Glenn Bedonie	Joseph Handy	Carol Surowiec
Fred Brummer	Kevin J. Herzberg	William D. Townsend
Kevin Carmichael	Kevin Lockwood	Cass D. Vickers
Billy Cook	Kenneth Mueller	Rex Ware
Yvonne Gallimore	Canita Peterson	Jeryl Weithorn
Jennifer Green	Joseph Rendon	
Harry Floyd	Sue Shore	

## Conference Site

### Embassy Suites Tampa/USF

3705 Spectrum Blvd  
Tampa, FL 33612-9412  
Tel: (813) 977-7066

FICPA Room Rate: \$119 Single or King

Hotel Cutoff Deadline: **January 12, 2004**

*(Reservations made after the cutoff date will be subject to availability and current room rate.)*

Please call the hotel directly at (813) 977-7066 to reserve your room and remember to mention the FICPA to receive the special group rate.



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