

# IPT ADVANCED PROPERTY TAX ACADEMY

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IPT PROPERTY TAX ACADEMY AND  
HELP ESTABLISH INDUSTRY PRACTICES

PRELIMINARY PROGRAM  
NOVEMBER 6-9, 2005  
EDEN ROC RENAISSANCE  
MIAMI, FLORIDA

# **IPT Advanced Property Tax Academy - Preliminary Program**

## **Eden Roc Renaissance, Miami, Florida**

### **November 6-9, 2005**

The 2005 Advanced Academy is pioneering the application of a structured format that addresses critical issues facing property tax professionals today. No more than 75 professionals will be able to participate in the first academy, which consists of general session presentations on select topics to help you do more with less as well as small breakout groups focused on addressing one specific issue which both corporate and non-corporate tax professionals face today as they are told to do more with less.

The purpose of the small breakout groups is to provide the opportunity for a group of experienced tax managers to formulate best practices or industry standards that cannot be developed by one individual alone. These types of breakout groups are very effective because of the highly participatory nature of the process which encourages easy recording and comparison of thoughts and ideas, as well as facilitating a clearer understanding of the documented outcome.

The end result of these small group sessions is a final report that documents the findings of each workshop and is distributed to the participants after the seminar.

#### **SUNDAY, NOVEMBER 6, 2005**

4:00-7:00pm      **Registration**

6:00-7:00pm      **Welcoming Networking Hour**

#### **MONDAY, NOVEMBER 7, 2005**

7:00-7:45am      **Continental Breakfast (Eden Roc Renaissance Hotel Guests only)**

8:00-8:30am      **Opening of Academy**  
**Carolyn L. Elerson, CMI**  
IPT President

**Overview of Format**  
**Samuel P. Birchfield, CMI,**  
Advanced Property Tax Academy School Chair

8:30-10:00am      **General Session**  
**Restoring Confidence in Business Through Ethical Behavior**

Over the past few years, more companies have restated earnings than at any time in history. Some of those restatements caused the collapse of the company. Decisions on everything from valuation to timing to expenses were often not examined from an ethical perspective and pushed the legal envelope.

The indictment of the former Tyco CEO for sales tax evasion in the sale of his personal art works spoke volumes to investors. The question now is, "Can we ever trust again?" The past year has taught us many lessons: Trust is at the heart of good regulatory relations, customer service and investor faith; and, at the heart of trust, is ethics.

This session will explore the importance of ethics for all aspects of business operations and all types of decisions, and emphasize its role in reestablishing trust. In fact, the capitalist system depends upon markets that function properly and such markets require trust and ethical conduct by participants.

*Speaker:*

**Marianne M. Jennings, Esq.**  
Professor of Legal and Ethical Studies  
Arizona State University  
Tempe, Arizona

10:15-11:45am **General Session**

**Conflict Resolution: Settling Your Dispute: Tips, Tricks, Traps and Tools**

Property tax valuation and assessment are, by nature, given to controversy. Taxpayers and taxing bodies rarely have a true “meeting of the minds” as to what creates a fair result. Traditional litigation forces the court to decide value when parties cannot agree themselves. More jurisdictions are looking to alternative dispute resolution methods as a means to settle disputes. Properly managed negotiations and mediations can bring earlier, less expensive and more durable resolutions to property tax issues. Our speaker is an experienced negotiator, mediator and trainer. He has settled disputes in everything from “Admiralty to Zoning.” Learn practical tools you can use in your property tax discussions. Learn techniques to reach “resolution,” not just “settlement” where both sides walk away unhappy! Learn to disagree without being disagreeable, explore – not debate, and fix problems without fixing blame. Recognize when someone is attempting to “play” you and how to refocus the discussion. Learn strategies for dealing with confrontation, the “pit-bull” and apparent impasse. No touchy-feely psychobabble or incomprehensible legalese. Just plain talk, uncovering hidden agendas and getting the job done!

*Speaker:*

**Sam Imperati**  
Attorney  
Institute for Conflict Management, Inc.  
Portland, Oregon

11:45am-1:00pm **Luncheon**

1:00-2:00pm **General Session**  
**The Art of Principled Negotiation**

Negotiation is a powerful business tool. It can pull people together, move ideas forward, excite change and forge constructive solutions. As a matter of fact, a tax professional's job often requires the ability to successfully negotiate in a variety of situations and circumstances. However, quite often we get caught up in the process and don't know how to effectively "advance the ball." What constitutes successful negotiating? Is it simply a matter of getting your own way? Is there a way to walk away with ALL parties feeling successful? In this lively workshop, you will have fun learning the art of principled negotiations -negotiations that are not simply convincing and selling, but are instructional and collaborative.

*Speaker:*

**Michael J. Guerriero, Esq.**

Counsel  
Pitney Hardin LLP  
Morristown, NJ

2:15-4:45pm

**Interactive Structured Breakout Groups**

Attendees will be assigned to structured small groups of no more than ten to twelve people in an interactive environment to produce a large number of ideas in a relatively short period of time which will be developed into a white paper on how to deal with a particular topic. This not only identifies issues that concern many as well as being useful for individual decision-making, but also is a technique to enhance effectiveness and efficiency in planning. For this type of session to be meaningful, full participation is necessary and participants must remain and provide input throughout the entire session. Individual breaks for answering voice mail, etc., will be scheduled at the discretion of each group.

**TUESDAY, NOVEMBER 8, 2005**

7:00-7:45am

**Continental Breakfast (Eden Roc Renaissance Hotel Guests only)**

8:00-9:45am

**General Session**

**Writing in Today's Business Environment – Hurry and Get it Done!**

In this world of instant messaging, is there more needed than yes, no, later or maybe? Today, email is the vehicle for most business correspondence and determines, in many instances, the first impression made by the sender. With the growing demand to document everything, do you need a record of a response? You write a question and the response comes back answering a different question – was it something that was not conveyed? Come hear some effective techniques for constructing appropriate email and other business written communication.

*Speaker:*

**Judy B. Birchfield**

Senior Consultant  
Ryan & Company  
Dallas, Texas

10:00-12 Noon

**Interactive Structured Breakout Groups**

12-1:15pm

**Luncheon**

1:15-4:45pm

**Interactive Structured Breakout Groups**

**WEDNESDAY, NOVEMBER 9, 2005**

7:00-8:00am

**Continental Breakfast (Eden Roc Renaissance Hotel Guests only)**

8:30-11:30am

**General Session**

### **Case problem to work out solution**

In the final session, the group, at large, is directed in assimilating the findings and conclusions from the first two days of the Academy. Spirited participation required. The objective of this final session will be to reach a consensus on some best practices for the collective property tax field. These "best practices" will offer all Academy participants benchmarking standards to take back home to their own property tax operations and departments.

11:30am

### **Academy Conclusion**

#### **2005 Advanced Property Tax Academy Chair**

Samuel P. Birchfield, CMI  
Ryan & Company

#### **Special Advisor to Committee**

Charles E. Gilliland, Ph.D., Research Economist  
Texas A&M University

## REGISTRATION INFORMATION

Any IPT member or employee of a member company/firm that has members in the Institute may attend the Academy. Enrollment is limited to 75 participants and is accepted on a first received basis with CMIs being given priority until September 1, 2005. The registration fee provides for the usual expenses and also includes two luncheons, a reception, refreshment breaks, and Academy materials.

**In order to encourage early registration, a discount of \$25.00 is available to those who register prior to October 6, 2005. The fees (U.S. funds) are:**

### Payments received by October 6, 2005:

\$350	Individual holds the CMI designation
\$650	Individual personally holding membership in IPT; but not the CMI designation
\$875	Individual does not hold membership, but company/firm has members in IPT
\$1,000	No one from company belongs to IPT; however, individual meets membership eligibility requirements

### Payments received after October 6, 2005:

\$375	Individual holds the CMI designation
\$675	Individual personally holding membership in IPT; but not the CMI designation
\$900	Individual does not hold membership, but company/firm has members in IPT
\$1,025	No one from company belongs to IPT; however, individual meets membership eligibility requirements

Please see registration form.

A confirmation of acceptance will be sent. All registrations must be paid in full within three weeks of acceptance and prior to the Academy. A \$50 surcharge applies if payment is still outstanding as of November 9, 2005. 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:  
**1200 Abernathy Road, N.E.**  
**Building 600, Suite L-2**  
**Atlanta, GA 30328.**

**Telephone:** 404-240-2300  
**Fax:** 404-240-2315

### Cancellation/Substitution Policy

Refunds, subject to a cancellation charge of \$100, will be made upon written notification of cancellations received by October 28, 2005. There is also a substitution charge of \$40 before October 6, 2005, \$50 after that date and any fee increase due to membership differential. Substitute must be someone from the registrant's company.

All registrations are to be handled in **ADVANCE** through the IPT office. If a person is not registered in advance, a surcharge of \$25 will be assessed over and above the regular registration fee. Admission to all social functions and sessions is by display of badge (tickets when applicable).

Prerequisites: CMI or 7 years of property tax experience  
Field of Study: Taxation  
Program Level: Advanced  
Instructional Method: Group Live

**Continuing Education Credits:** 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](http://www.nasba.org). Eighteen (18) CPE credits are available for full attendance. In accordance with the standards of the National Registry of CPE Sponsors, CPE credits are granted based on a 50-minute hour. **Certificates of Attendance should be submitted to IPT no later than 60 days after the end of the program.**

Registrants who wish to obtain credit from other organizations may have their particular forms signed by the IPT staff. CMIs will receive hour for hour continuing education credits for actual session attendance upon submittal of the appropriate continuing education form.

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

While IPT, as an organization, promotes professional networking with other tax professionals, the Institute does wish to remind everyone that as an organization, we prohibit solicitation of business at IPT functions. Because this is difficult to define, it is requested that, if you feel that you are being solicited and you are offended by the action(s), that you please advise the person soliciting you that his or her solicitation is unwanted; if the behavior persists, please notify IPT staff immediately so the matter can be directly addressed.

**Dress:** For the Academy, business casual dress is appropriate throughout the daytime sessions.

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

## HOTEL INFORMATION AND RESERVATIONS

Please make your hotel reservations directly with the hotel (not IPT) using one of the following methods. **Reservations should be made promptly before the room block fills and no later than September 28<sup>th</sup>. Reservations requested beyond the cut-off date or after the room block is filled, whichever comes first, are subject to availability.** Rooms may still be available after the cut-off-date, but not necessarily at the IPT group rate.

- **FAX** the completed hotel reservation form to the reservations office at: **(305) 674-5568, Attention Reservations.**
- **TELEPHONE** your reservation directly to the Eden Roc Renaissance, Miami at **(305) 531-0000 or (800) 327-8337 (You must identify yourself as a member of IPT to receive the established group rate.)**
- **MAIL** the completed form to: Eden Roc Renaissance  
4525 Collins Avenue  
Miami, FL 33140
- **ONLINE** reservations can be made by visiting <http://www.edenroccresort.com/reservations.htm>. Click **Online Reservations** and enter appropriate dates and applicable information including IPT **Group Code IPTIPTA**. Click **Find**, select your room preferences and complete your reservation.

The group rate is \$198 for single or double occupancy and \$248 for an ocean-front balcony room. For other guest room options available at IPT's group rate, please contact the hotel.

The Miami Airport is approximately 11 miles from the Eden Roc Renaissance. Estimated taxi fare is \$24 one way.

Check-in time is after 3:00 p.m. Check-out time is prior to 11:00 a.m. Special requests should be made directly with the hotel. All reservations are subject to a local room tax. Please mention that you are attending the Institute's program in all contact with the hotel.