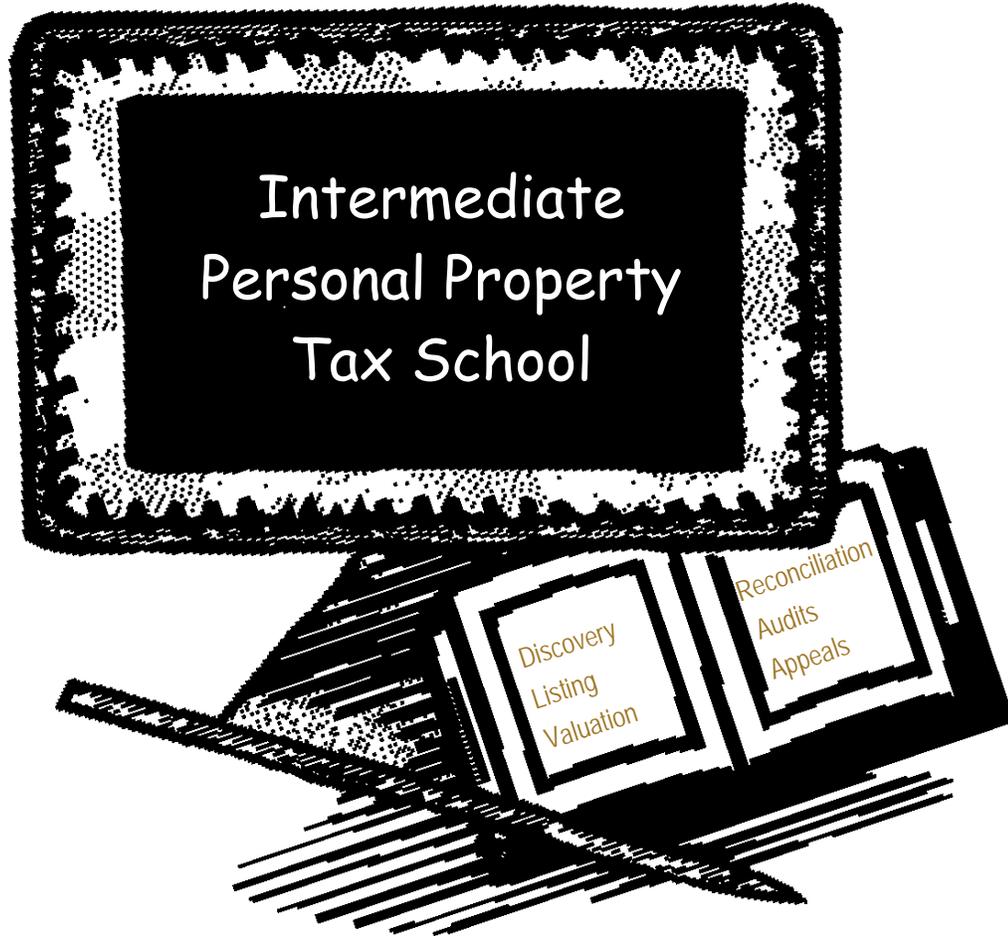


# Institute for Professionals in Taxation Preliminary Program



**Georgia Tech Hotel and Conference Center  
October 22-26, 2006  
Atlanta, Georgia**



# Faculty:

**Todd R. Barron, CMI**  
Director  
Advantax Group, LLC  
St. Charles, IL

**Diane D. Brown, CMI**  
Manager, Property Tax  
Cooper Industries  
Houston, TX

**Michelle Sutton Cardwell, CMI**  
Partner  
Deloitte Tax LLP  
Houston, TX

**Brad D. Gorski, CMI**  
Property Tax Director  
eProperty Tax Inc.  
Marietta, GA

**Samuel C. Kinslow, CMI**  
Major Accounts Client Manager  
Burr Wolff, LP  
Houston, TX

**David H. LeVan, CMI**  
President  
Advantax Group, LLC  
St. Charles, IL

**Chris G. Muntifering, CMI**  
Senior Manager, Property Taxes  
General Mills  
Minneapolis, MN

**Kellianne M. Nagy**  
Director - Business Development  
The JohnBernard Company  
Royal Oak, MI

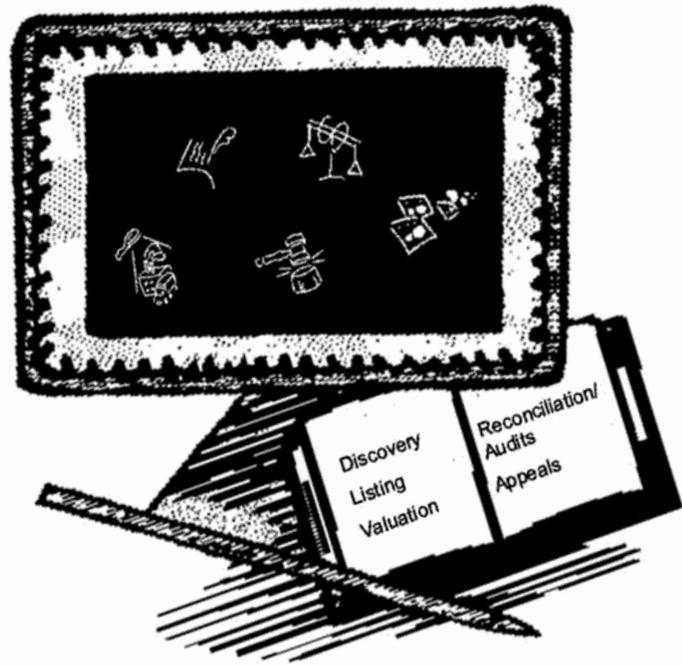
**Donald F. Nesci**  
District Manager  
DuCharme, McMillen & Associates, Inc.  
Lisle, IL

**Shari K. Bowden Tucker, CMI**  
Manager  
Property Tax Assistance Co., Inc.  
Bellflower, CA

**T. L. Twomey, II, CMI**  
Director  
PricewaterhouseCoopers LLP  
Houston, TX

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

**William R. Zelibor**  
VP of Operations  
Advantax Group, LLC  
Indianapolis, IN



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.

**2006 Intermediate Personal Property Tax School — Preliminary Program  
Georgia Tech Hotel and Conference Center • Atlanta, Georgia  
October 22 - 26, 2006**

**SUNDAY, OCTOBER 22, 2006**

3:00 - 4:30 pm	<b>Registration</b>
4:30 pm	<b>Mandatory Student Orientation</b>
	<b>Brief Highlights of IPT</b>
	<b>Daniel Peterson, CMI</b> President Elect Institute for Professionals in Taxation
	<b>Course Introduction</b>
	<b>David H. LeVan, CMI</b> Program Chair 2006 Intermediate Personal Property Tax School
	<b>Objectives of Course and Introduction to the Material</b>
(To follow Immediately after the Orientation)	<b>Concurrent Breakout Session — Number 1</b>

Students will be divided into four groups and will actively participate in the session. Refer to registration list for Group Assignment.

7:00 pm	<b>Get-Acquainted Informal Dinner</b> Informal hospitality, prior to dinner, begins when the session concludes. All registrants are expected to attend.
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**MONDAY, OCTOBER 23, 2006**

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

**TUESDAY, OCTOBER 24, 2006**

7:00 - 7:45 am	<b>Buffet Breakfast (Guests of hotel only)</b>
8:00 - 8:30 am	<b>Quiz/Review</b>
8:30 - 9:30 am	<b>Concurrent Breakout Session — Number 4</b>
9:45 - 10:45 am	<b>Valuation - Inventory &amp; Leased Equipment</b>
11:00 - 12 noon	<b>Valuation - Advanced Depreciation Concepts</b>
12:00 - 1:00 pm	<b>Buffet Lunch</b>
1:00 - 2:45 pm	<b>Valuation - Advanced Depreciation Concepts, continued</b>
3:00 - 5:00 pm	<b>Concurrent Breakout Session — Number 5</b>
5:00 - 10:00 pm	<b>Study Hall Open</b>
6:00 - 9:00 pm	<b>Dinner (Guests of hotel only) (Available in Main Dining Room)</b>

**WEDNESDAY, OCTOBER 25, 2006**

7:00 - 7:45 am	<b>Buffet Breakfast (Guests of hotel only)</b>
8:00 - 8:30 am	<b>Quiz/Review</b>
8:30 - 9:15 am	<b>Concurrent Breakout Session — Number 6</b>
9:30 - 10:45 am	<b>Reconciliation</b>
11:00 - 12 noon	<b>Audits</b>
12:00 - 1:00 pm	<b>Buffet Lunch</b>
1:00 - 1:45 pm	<b>Appeals</b>
1:45 - 2:15 pm	<b>Quiz/Review</b>
2:30 - 3:30 pm	<b>Concurrent Breakout Session — Number 7</b>
3:30 - 5:30 pm	<b>Group Case Study Presentations</b>
5:30 - 6:30 pm	<b>Networking Social Hour</b>
6:00 - 9:00 pm	<b>Dinner (Guests of hotel only) (Available in Main Dining Room)</b>
6:30 - 10:00 pm	<b>Study Hall open</b>

**THURSDAY, OCTOBER 26, 2006**

7:00 - 7:45 am	<b>Buffet Breakfast (Guests of hotel only)</b>
8:00 - 8:45 am	<b>Case Study Summaries</b>
9:00 - 10:30 am	<b>Course Review</b>
10:45 - 12:30 pm	<b>Final Quiz</b>
12:30 pm	<b>Course Concludes</b>

# 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 22, 2006), 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, a discount of \$25 is available to those who register on or before September 22, 2006. The fees (U.S. funds) are:

#### Payments received by September 22, 2006\*:

- \$775 (Individual personally holding membership in IPT)
- \$975 (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 22, 2006\*:

- \$800 (Individual personally holding membership in IPT)
- \$1,000 (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 22, 2006, the \$25 discount does not apply. This includes faxed registration forms received without payment prior to this date.

As indicated above, there is an additional \$200 charge for an individual 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 \$975. 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 \$775. Please see registration form. There is also a \$375 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 \$50 surcharge applies if payment is outstanding as of October 26, 2006. 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: 1200 Abernathy Road, NE, Building 600, 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 13, 2006. There is also a substitution charge of \$40 before September 22, 2006, \$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

There are separate costs for the hotel package. Please refer to the hotel reservation form. The Georgia Tech Hotel and Conference Center is located at 800 Spring Street, Atlanta, GA, 30308. The rate is \$792.80 (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 room rate for those nights is \$119 plus all applicable taxes. This rate is based upon availability and is subject to change.

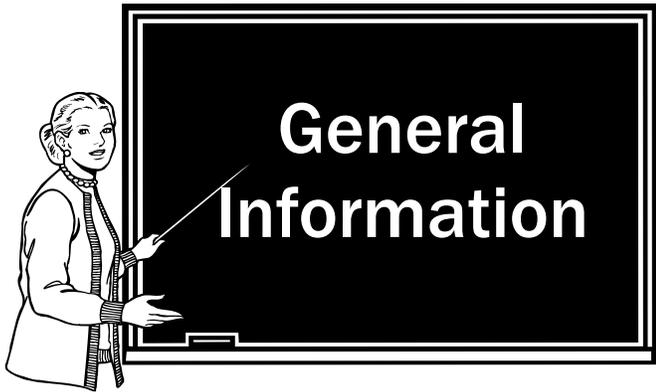
For one occupant the room package rate of \$792.80 provides for four full breakfasts, three lunches, four dinners, refreshment breaks and the daily participant fee. The package rate is on a per person basis. For information on double occupancy, please contact the Georgia Tech Hotel & Conference Center for the applicable per person rate. The cost of parking is not included.

## 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.

Georgia Tech offers many nationally recognized, top-ranked programs. 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 22, 2006. Registrants should pick up their materials at that time.

**Orientation, scheduled for 4:30 p.m. on Sunday, October 22, is required for all students.**

**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-door 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.**

Fluency in English is required for successful completion of this course. Foreign Language dictionaries may not be used during examinations.

Photos will be taken at this event to use in publications, on the IPT website, and photo albums. Your attendance at this event grants IPT the right to publish these photos.

### **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](http://www.ipt.org), or you may contact the IPT office at 404.240.2300.

### **Continuing Education Credit**

Approximately thirty-three (33) 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.

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, Suite 700, Nashville, TN, 37219-2417. Web site [www.nasba.org](http://www.nasba.org). 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 of property tax experience is recommended

**Program Level:** Intermediate

**Field of Study:** Taxation (Property Tax)

**Instructional Method:** Group Live

**Advance Preparation Required:** None

## **School Committee**

**Chair:**

**David H. LeVan, CMI**

**Vice-Chair:**

**Diane D. Brown, CMI**

**Overall Chair,**

**Property Tax Education:**

**Anthony R. Thompson, CMI**