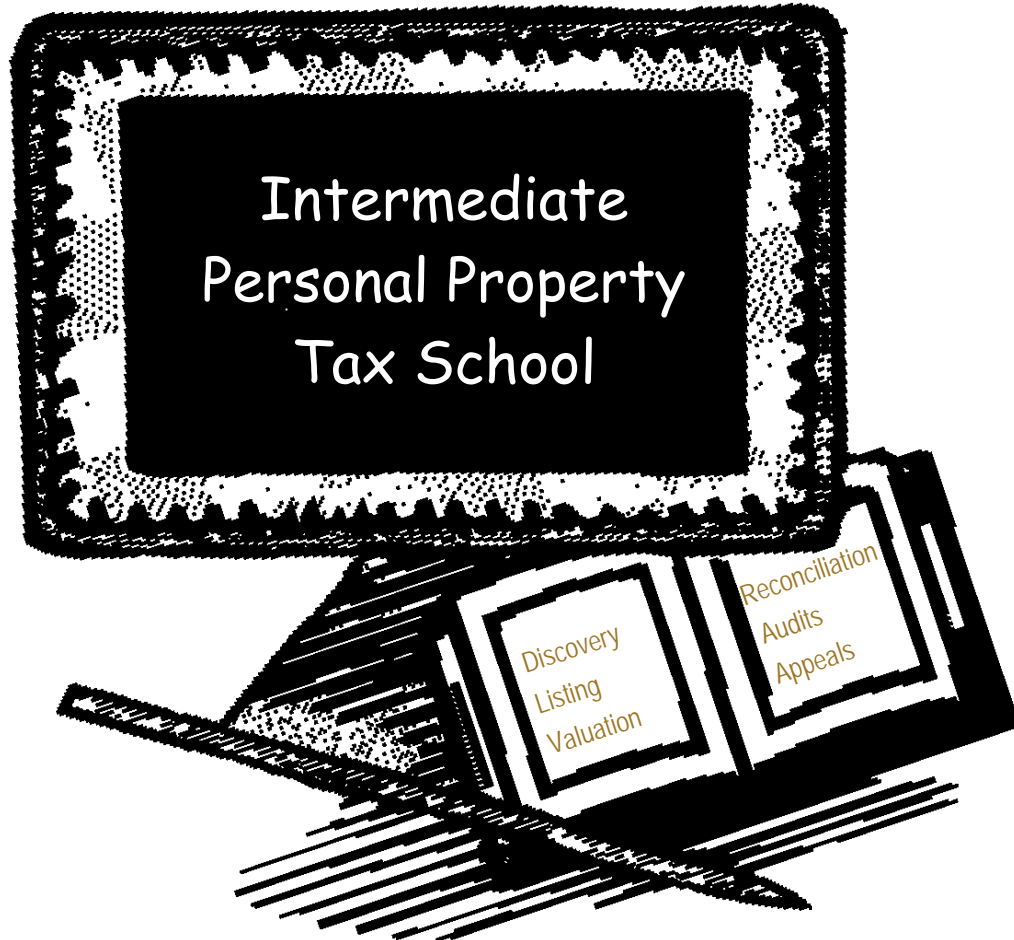


Institute for Professionals in Taxation Preliminary Program



**Georgia Tech Hotel and Conference Center
October 7-11, 2007
Atlanta, Georgia**



Faculty:

Todd R. Barron, CMI
Tax Consultant
Wheaton, IL

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

Brad D. Gorski, CMI
Senior Account Manager Property Tax
Thomson Tax & Accounting
Marietta, GA

Sam C. Kinslow, CMI
National Director of Real Estate Consulting
Advantax Group, LLC
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, CAE
Business Development
Ryan & Company
Royal Oak, MI

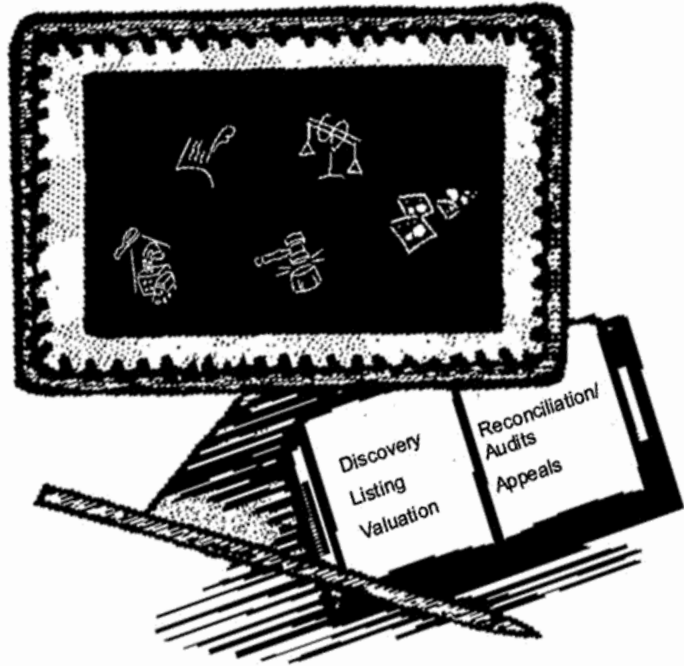
Donald F. Nesci
Manager, Real Estate and Property Tax
Abbott Laboratories
Abbott Park, IL

Shari K. Bowden Tucker, CMI
Area Manager
Property Tax Assistance Co., Inc.
Chico, CA

Tommy L. Twomey, II, CMI
Director
PricewaterhouseCoopers LLP
Houston, TX

Anna T. Westbrook, CMI
Senior Manager
Deloitte Tax LLP
Atlanta, GA

William R. Zelibor
Vice President 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.

2007 Intermediate Personal Property Tax School — Preliminary Program
Georgia Tech Hotel and Conference Center • Atlanta, Georgia
October 7 - 11, 2007

SUNDAY, OCTOBER 7, 2007

3:00 - 4:30 pm **Registration**

4:00 pm **Mandatory Student Orientation**
Course Introduction: Objectives of Course and Introduction to the Material
Chris G. Muntifering, CMI
Program Chair
2007 Intermediate Personal Property Tax School

4:45 - 5:00pm **Brief Highlights of IPT**
Rolston A. Dyer, CMI
President Elect
Institute for Professionals in Taxation

5:00 - 6:00pm **Ethics**
Brad D. Gorski, CMI
Senior Account Manager Property Tax
Thomson Tax & Accounting
Marietta, GA

6:15 - 7:15pm **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.

7:15 pm **Get-Acquainted Informal Dinner**
Informal hospitality, prior to dinner, begins when the session concludes. All registrants are expected to attend.

MONDAY, OCTOBER 8, 2007

6:30 - 7:45 am **Buffet Breakfast (Guests of hotel only)**

8:00 - 9:30 am **Discovery**
Instructor:
Diane D. Brown, CMI
Manager, Property Tax
Cooper Industries
Houston, TX

9:45 - 12 noon **Listing**
Instructor:
David H. LeVan, CMI
President
Advantax Group, LLC
St. Charles, IL

12:00 - 1:00 pm **Buffet Lunch (All students)**

1:00 - 2:00 pm **Concurrent Breakout Session — Number 2**

2:15 - 4:15 pm **Valuation**
Machinery and Equipment, Depreciable Personal Property
Instructor:
Todd R. Barron, CMI
Tax Consultant
Wheaton, IL

4:30 - 5:30 pm **Concurrent Breakout Session — Number 3**

5:45 - 10:00 pm **Study Hall open**

6:00 - 9:00 pm **Dinner (Guests of hotel only - available in main dining room)**

TUESDAY, OCTOBER 9, 2007

6:30 - 7:45 am **Buffet Breakfast (Guests of hotel only)**

8:00 - 8:30 am **Quiz/Review**

8:30 - 9:30 am **Concurrent Breakout Session — Number 4**

9:45 - 10:45 am **Valuation - Inventory & Leased Equipment**
Instructor:
William R. Zelibor
Vice President of Operations
Advantax Group, LLC
Indianapolis, IN

11:00 - 12 noon **Valuation - Advanced Depreciation Concepts**
Instructor:
Donald F. Nesci
Manager, Real Estate and Property Tax
Abbott Laboratories
Abbott Park, IL

12:00 - 1:00 pm **Buffet Lunch (All students)**

1:00 - 2:45 pm **Valuation - Advanced Depreciation Concepts, continued**

3:00 - 5:30 pm **Concurrent Breakout Session — Number 5**

5:45 - 10:00 pm **Study Hall Open**

6:00 - 9:00 pm **Dinner (Guests of hotel only - available in main dining room)**

WEDNESDAY, OCTOBER 10, 2007

- 6:30 - 7:45 am Buffet Breakfast (Guests of hotel only)
- 8:00 - 8:30 am Quiz/Review
- 8:30 - 9:15 am Concurrent Breakout Session — Number 6
- 9:30 - 10:45 am **Reconciliation**
Instructor:
Shari K. Bowden Tucker, CMI
Area Manager
Property Tax Assistance Co., Inc.
Chico, CA
- 11:00 - 12 noon **Audits**
Instructor:
Tommy L. Twomey, II, CMI
Director
PricewaterhouseCoopers LLP
Houston, TX
- 12:00 - 1:00 pm Buffet Lunch (All students)
- 1:00 - 1:45 pm **Appeals**
Instructor:
Kellianne M. Nagy, CAE
Director of Business Development
Ryan & Company
Royal Oak, MI
- 1:45 - 2:15 pm Quiz/Review
- 2:30 - 3:30 pm Concurrent Breakout Session — Number 7
- 3:30 - 6:10 pm Group Case Study Presentations
- 6:15 pm Networking Social Hour
- 6:30 - 9:00 pm Dinner for all attendees and instructors
- 6:30 - 10:00 pm Study Hall open

THURSDAY, OCTOBER 11, 2007

- 6:30 - 7:45 am Buffet Breakfast (Guests of hotel only)
- 8:00 - 8:45 am Case Study Summaries
- 9:00 - 10:30 am Course Review
- 10:45 - 12:30 pm Final Quiz
- 12:30 pm Course Concludes

School Committee

Chair:

Chris G. Muntifering, CMI
General Mills
Minneapolis, MN

Vice-Chair:

Diane D. Brown, CMI
Cooper Industries
Houston, TX

Overall Chair,

Property Tax Education:

Anthony R. Thompson, CMI
Law Office Anthony R. Thompson
Allentown, PA



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 7, 2007), 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 7, 2007. The fees (U.S. funds) are:

Payments received by September 7, 2007*:

- \$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 7, 2007*:

- \$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 7, 2007, 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 still outstanding as of October 11, 2007. 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 September 28, 2007. There is also a substitution charge of \$40 before September 7, 2007, \$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. The Georgia Tech Hotel and Conference Center is located at 800 Spring Street, Atlanta, GA, 30308. The rate is \$824.07 (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. This rate is based upon availability and is subject to change.

For one occupant the room package rate of \$824.07 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. **The double occupancy rate of \$672.76 is per person and not per room.** The cost of parking is not included.

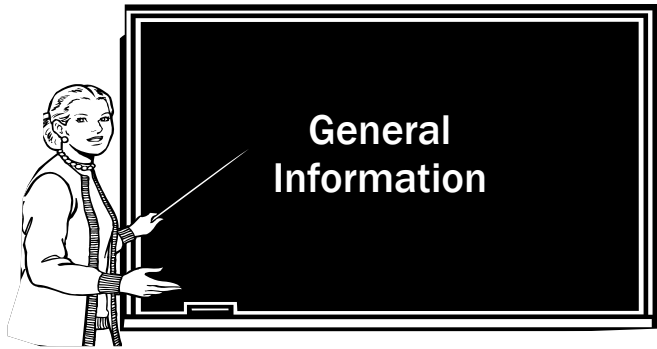
Prerequisites: Property Tax School or three years or more property tax experience is recommended

Program Level: Intermediate

Field of Study: Taxation (Property Tax)

Instructional Method: Group Live

Advance Preparation Required: None



The IPT registration desk will be open from 3:00 - 4:30 p.m. on Sunday, October 7, 2007. Registrants should pick up their materials at that time.

Orientation, scheduled for 4:30 p.m. on Sunday, October 7, 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://www.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. 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

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.

IPT is on file as an approved provider with the Texas Department of Licensing and Regulation.

As required by regulatory agencies, IPT must verify individual attendance at sessions in order to grant Continuing Education Credits. Each attendee's name badge has a unique barcode that identifies that individual. In order to obtain CE credit, the individual must have his or her bar-coded badge scanned during the first 15 minutes of each session. No credit for the session will be given to un-scanned attendees. Lost name badges should be reported immediately to an IPT staff member for replacement. All attendees will receive a Certificate of Attendance with a record of their scanned attendance.

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