

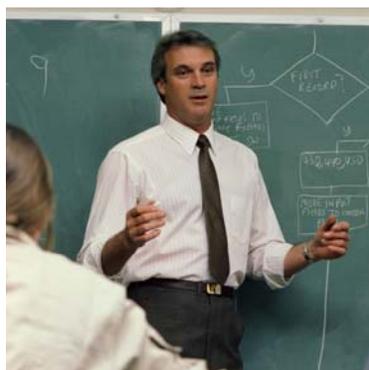
Institute for Professionals in Taxation



IPT 32nd Annual Conference

June 22 - 25, 2008

Omni Hotel at CNN Center, Atlanta, Georgia



IPT's 32nd Annual Conference

Omni Hotel at CNN Center • Atlanta, Georgia • June 22-25, 2008

Preliminary Program

Saturday, June 21, 2008

4:00 - 7:00 p.m. Early Registration

Sunday, June 22, 2008

3:30 - 8:30 p.m. Registration

3:30 - 5:00 p.m. CMI Concurrent Income, Property, and Sales Tax Orientation Sessions

The purpose of the CMI Orientation Sessions is to review and explain the professional designation program offered by the Institute. During these sessions, members of each of the professional designation committees explain the professional and educational requirements for candidacy and certification for each discipline. They also provide an overview of the format and subject matter of the CMI written and oral exams. IPT encourages all members who are interested in pursuing the CMI professional designation to attend.

5:00 - 6:00 p.m. Annual Business Meeting

- Election of officers and members to the Board of Governors.
- Discussion of Institute business and plans.

6:00 - 7:30 p.m. Opening Reception in Exhibit Hall

Welcome to Atlanta! Reception is included in conference registration fee. Spouses/guests register for this event via supplemental fee. Admittance is by badge/ticket.

6:00 - 8:00 p.m. Exhibits Open

This is an excellent opportunity to view products — computers, software, system management, publications, data services, valuation aids, and maps — of interest to property, income, and sales tax professionals. Exhibits are limited to product-oriented vendors.

Monday, June 23, 2008

7:00 - 8:00 a.m. Exhibits Open

7:00 a.m. - 4:00 p.m. Registration Continues

Coffee and pastries will be available with the exhibitors (included in conference registration fee). Spouses/guests register for this event via a supplemental fee. Admittance is by badge only.

8:00 - 8:45 a.m. Opening of Conference

Welcome by IPT President *Rolston A. Dyer, CMI*
Introduction of invited guests

8:45 - 9:45 a.m. Opening Keynote Session

The Future of the U.S. Economy

There is considerable uncertainty regarding the performance of the U.S. economy in the near future. Dr. Ratajczak, one of the leading econometric forecasters in the country, will provide his forecast for the U.S. economy in 2008 and beyond. Dr. Ratajczak ranked second in a national survey of the most accurate economic forecasters of the US economy by *USA Today* and the Federal Reserve Bank of Atlanta. He received the U.S. Blue Chip Economic Forecasting Award for the most accurate U.S. Blue Chip forecast. He is often interviewed and quoted in *The New York Times*, *Business Week*, *Fortune*, *Wall Street Journal*, *Newsweek*, CNN, NBC, and CNBC.

Keynote Speaker:

Donald Ratajczak, PhD

Regents Professor Emeritus of Economics at Georgia State University and a Consulting Economist
Atlanta, GA

10:00 - 10:45 a.m. Joint General Session

Cut or Spend: How Will States Respond to an Economic Slowdown?

Many state governments have experienced a decline in tax revenues. This session will draw out the implications of the national economic environment for the continuing performance of state government finance. Recent revenue performance will be described and assessed. Then, state options for handling budget shortfalls will be described and evaluated. Rate increases, rainy day funds, and spending cuts are among the alternatives that will be discussed. The volatility of individual state tax sources will be evaluated to determine whether alternative revenue sources could lessen the revenue volatility.

Speaker:

William F. Fox, PhD

Professor, Department of Economics Director
Center for Business & Economic Research
The University of Tennessee
Knoxville, Tennessee

Monday, June 23, 2008, continued

10:45 – 11:45 a.m. Joint General Session

The Model State Administrative Tax Tribunal Act

A discussion of proposed uniform legislation, endorsed by the American Bar Association, that would create in an adopting state an independent, executive branch tax tribunal that would adjudicate tax disputes before any payment of the disputed tax is required. The session will be presented by one of the Act's draftsmen and the chair of the ABA Tax Section committee responsible for promotion of the Act. The panelists will review the relevant history leading to the drafting of the Act, walk IPT members through its provisions, report on various actions taken by the states in response, and offer a forecast for further legislative and tax agency developments on the proposal in the immediate future.

Speakers:

Garland Allen, Esq.
Attorney
Santa Monica, CA

Margaret C. Wilson, Esq.
Assistant General Counsel - State and Local Tax
Verizon
Basking Ridge, NJ

11:45 a.m.-1:00 p.m. Exhibits Open

11:45 a.m.-1:00 p.m. Lunch in Exhibit Hall

Lunch is included in conference registration fee for conferees

**1:00 p.m. – 2:15 p.m.
Income Tax Concurrent Sessions**

Stock Sale 338—(h)(10) Elections

Many taxpayers elect to have a stock transaction treated as a sale of assets pursuant to IRC Section 338(h)(10). While the federal tax consequences of this election are straightforward, the state tax implications can be less than clear. This session will examine the state tax treatment of 338(h)(10) transactions, including the extent to which states conform to the federal rules, sales/use tax, and real property transfer tax considerations, nexus issues, and whether the gain from a deemed asset sale under section 338(h)(10) should be treated as allocable or apportionable income.

Speakers:

Ethan D. Millar, Esq.
Associate
Alston & Bird LLP
Atlanta, GA

John F. Ormsby, Esq., CPA
Senior Tax Attorney
Sara Lee Corporation
Chicago, IL

Federal Tax Doctrines in State and Local Taxes *(Repeated at 2:30 p.m.)*

Business Purpose, Sham Transaction, Step Transaction . . . These are some of the major doctrines that are well-developed in the context of federal taxation. This session will examine what taxpayers need to know about the genesis of these federal tax doctrines and their application to state and local taxation, including which doctrines states are most likely to adopt, which states are at the forefront of adopting them, and how states may attempt to apply these doctrines to sales and property taxes, as well as income tax.

Speakers:

Giles B. Sutton, Esq.
Partner
Practice Leader, State & Local Tax Technical Services
Grant Thornton LLP
Charlotte, NC

**1:00 p.m. – 2:15 p.m.
Property Tax Concurrent Sessions**

Effective Property Tax Case Presentations *(Repeated at 2:30 p.m.)*

In this session the speakers will discuss how to prepare your case to prevail at your property tax hearing and share some effective negotiation techniques.

Speakers:

Gene C. Acuff, CMI, CPA
Director, Property Taxes & Business Licenses
Lowe's Companies, Inc.
 Mooresville, NC

Mark S. Hutcheson, Esq., CMI
Partner
Popp, Gray & Hutcheson, LLP
Austin, TX

Monday, June 23, 2008, continued

Obsolescence - Measuring the Impact for Industries Experiencing Change *(Repeated at 4:00 p.m.)*

How do the recent global economic trends and technological developments impact obsolescence, and more importantly, how do you successfully identify and quantify it? A focus will be on high-tech, cable, and energy-intensive industries.

Moderator:

David G. Hurrell, CPA

Managing Director
UHY Advisors SALT, LLC
Berea, OH

Speakers:

Brenda Jo Beck

Global Property Tax Manager
Ford Motor Company
Dearborn, MI

John H. Davis, III, PhD, MAI, ASA, SRPA

President
JHDIII, Inc.
Birmingham, AL

Earl M. Robinson, CDP

Principal & Director
AUS Consulting
Tijeras, NM

Recent Legislative and Case Law Updates - Indiana and Michigan

This session provides an overview of the Michigan property tax impact of recent legislative changes in the MBT on property taxes and recent Michigan property tax appeal decisions. A summary of pertinent Indiana legislation and Indiana property tax hot topics will also be presented.

Moderator

Joshua J. Malancuk, CMI, CPA

Executive
Crowe Chizek and Company LLC
Indianapolis, IN

Speakers:

James H. Diya, CMI

Senior Manager, Property Tax
Crowe Chizek and Company LLC
Oak Brook, IL

Randal J. Kaltenmark, Esq.

Partner
Barnes & Thornburg LLP
Indianapolis, IN

Gone Green Yet?

More and more companies are building 'Green Buildings'. The value of green construction starts was expected to exceed \$12 billion in 2007. Learn about the incentives, advantages, and what it means to your bottom line to go green.

Speakers:

Paul Naumoff, Esq.

National Director of Business Incentives and Credits
Ernst & Young LLP
Columbus, OH

Robert Foley

Director
Ryan
Burlington, MA

1:00 p.m. – 2:15 p.m.

Sales Tax Concurrent Sessions

Puerto Rico's Sales Tax *(Repeated at 4:00 p.m.)*

Since its adoption in late 2006, Puerto Rico's sales tax remains a mystery to most tax practitioners. This session will review the ins-and-outs of the tax base, compliance and where to obtain official information and guidance.

Speakers:

Teresita Fuentes, CPA

Tax Partner
Ernst & Young LLP
Hato Rey, Puerto Rico

Carlos E. Serrano, CPA, Esq.

Capital Member and Chair of the Tax Practice Group
McConnell Valdés LLC
San Juan, Puerto Rico

Improving Your Function's Corporate Visibility *(Repeated at 4:00 p.m.)*

Leverage "best-practices" from leading tax departments and consultants to make transactional tax one of the primary concerns in the decision making process.

Speakers:

Gwendolyn S. Evans, CMI

Senior Manager, Sales, Use and Property Taxes
Raytheon Company
Dallas, TX

Monday, June 23, 2008, continued

Jonathan Kraft

Manager of Benchmarking Services
DuCharme, McMillen & Associates, Inc.
Atlanta, GA

Emerging Tax Trends/Issues *(Repeated at 4:00 p.m.)*

Country-wide update on proposed and recently passed legislation, appeals, and emerging transactional tax issues

Speakers:

Susan K. Haffield, CPA

Partner
PricewaterhouseCoopers LLP
Minneapolis, MN

Arthur R. Rosen, Esq.

Partner
McDermott Will & Emery LLP
New York, NY

2:30 p.m. – 3:45 p.m.

Income Tax Concurrent Sessions

Federal Tax Doctrines in State and Local Taxes *(Repeated from 1:00 p.m.)*

FAS 109: Accounting for State Income Taxes

(Repeated at 4:00 p.m.)

This session will provide an overview of common financial reporting requirements under FAS 109 and FIN 48 from a state perspective. This will include a comprehensive discussion of various aspects of the calculation, disclosure requirements, impact of law changes, and best practices. Attendees will gain insight on the pros and cons of using database systems and spreadsheets to perform provision calculations. In addition, the session will cover accounting for state income taxes under both SFAS 5 and FIN 48.

Speakers:

Audrey M. Cienki

Supervisor, State & Local Tax
Comcast Corporation
Philadelphia, PA

David J. Sekula

Project Leader
GTM Technology Services LLC
Radnor, PA

2:30 p.m. – 3:45 p.m.

Property Tax Concurrent Sessions

Classification - Fundamental Issue with Evolving Impacts

This session will cover the gamut of classification issues - real vs. personal, phantom assets, software, componentization, cost segregations, and others.

Speakers:

Todd R. Barron, CMI

President
Barron Corporate Tax Solutions, Ltd
Wheaton, IL

Chris G. Muntifering, CMI

Senior Manager, Property & Sales/Use Taxes
General Mills, Inc.
Minneapolis, MN

Big Fish in a Small Pond

How does a taxpayer with a significant presence in a small taxing district divert political concerns, as a good corporate citizen, to strive for fair and equitable fair market value assessments?

Speakers:

Philip J. Giannuario, Esq.

Partner
Garippa, Lotz & Giannuario, P.C.
Montclair, NJ

Gregory E. Gursky, CMI

Director, Property & Non-Income Taxes
General Motors Corporation
Detroit, MI

Auditors Gone Wild *(Repeated at 4:00 p.m.)*

Third-party auditors have picked up the pace and some are especially aggressive. The speakers will discuss what to expect and how to prepare to minimize/eliminate an arbitrary audit assessment.

Speakers:

Robert J. DeWitte

Manager - Property Taxes
Masco Corporation
Taylor, MI

Charles Alan Long, CMI

Senior Manager
Ernst & Young LLP
Charlotte, NC

Monday, June 23, 2008, continued

Effective Property Tax Case Presentations

(Repeated from 1:00 p.m.)

2:30 p.m. – 3:45 p.m.

Sales Tax Concurrent Sessions

Stat Sampling

Does the phrase "wheels-off" mean anything to you? If so, this session will provide you with the tools to effectively plan, manage, and (oh no!) appeal an audit assessment based on statistical sampling. The session will also provide you with a list of the good, the bad, and the ugly states, and the various methodologies of sampling.

Speakers:

David S. Leifer, CMI

Director, Sales and Property Tax
InterContinental Hotels Group
Alpharetta, GA

Roger Pfaffenberger, PhD

Director, Audit Sampling Service
Ryan
Dallas, TX

E-Commerce: Purchasing Digitized Products under a Tangible-Based Tax Code

From music to software, shareware to data processing, law and rule-makers struggle to keep up with the ever growing e-commerce distribution channel of goods and services. Does the SSTA definition of "digital products" help or hurt your company's tax minimization strategy? Is MPU still viable?

Speakers:

Michael A. Jacobs, Esq.

Partner
Reed Smith LLP
Philadelphia, PA

Frank E. Taylor, CMI

Director Multistate Tax
Deloitte Tax LLP
San Jose, CA

Due Diligence Process for M & A

If the phrases, "We did what?" and "When?" are used too often by transactional tax, then this is the session for you. Learn how to develop and document your due diligence process, as well as how to insert the function into the M & A policy. Learn what

to look out for as well as estimating potential liabilities. Review industry "best practices" and guidance on how to place transactional tax at the top of the "to-do" list.

Speakers:

William M. Backstrom, Jr., Esq.

Partner
Jones Walker LLP
New Orleans, LA

Lynn L. Monsalvatge, CMI

Director - Sales Tax And Business Licenses
The Home Depot
Atlanta, GA

4:00 p.m. – 5:15 p.m.

Income Tax Concurrent Sessions

Mandatory Combined Income Tax Returns - Election Year Histrionics or a Slow March Toward The Inevitable?

It seems that every state and local tax update mentions another state legislator proposing mandatory combined income tax returns. This session will discuss this trend, as well as the perceived benefits, and often-overlooked pitfalls, to a state adopting combined reporting. The speakers will touch on the important issues that newly adopting states must resolve before implementing a system of combined returns, such as the standard for inclusion in the combined report, addressing intercompany transactions, the logistics of combining entities that otherwise use separate apportionment formulae, and handling net operating losses. The discussion will include a comparison of the combined reporting legislation recently enacted in Texas, Michigan, and West Virginia, as well as a look at some of the more creative aspects of recent legislation, such as not requiring the finding of a "unitary" business, the inclusion of partnerships, and blurring the lines between transaction taxes and income taxes (e.g. Ohio CAT and Texas Margins Tax).

Speakers:

Kimberly M. Hill, CPA

Senior Manager - State & Local Tax
KPMG LLP
Atlanta, GA

Linda A. Klang, Esq.

Vice-President
Lehman Brothers Inc.
Jersey City, NJ

FAS 109: Accounting for State Income Taxes

(Repeated from 2:30 p.m.)

**Monday, 4:00 p.m. – 5:15 p.m. —
Property Tax Concurrent Sessions**

Auditors Gone Wild (Repeated from 2:30 p.m.)

Retail, Hotel, Office and Residential - Identifying Risks and Parameters

Developing a mixture of uses in an existing development often faces significant challenges. For instance, retail, residential, and office uses have different rates of absorption. Inherent differences can hinder vertical integration and cost to the developer. Speakers will discuss how assessors treat in-line space vs. anchor space vs. big box space and the different valuation issues associated with each type of space.

Speaker:

John J. Coyle, III, MAI, CRE
President
Coyle, Lynch & Company
Sharon Hill, PA

Obsolescence - Measuring the Impact for Industries Experiencing Change

(Repeated from 1:00 p.m.)

**4:00 p.m. – 5:15 p.m.
Joint Concurrent Tax Session**

A Good Idea Gone Bad – Unclaimed Property

This session will provide an overview of current developments in unclaimed property. Some of the questions answered will be: What are the implications of the federal court decision in California for multi state unclaimed property reporting? How are companies managing this annual compliance responsibility? What are legislative changes that companies should know before the fall reporting period? When will the audits cease? Is voluntary compliance still an option?

Speakers:

Patricia F. Barganier

Managing Director
Barganier and Associates
Atlanta, GA

Lisa M. Bettencourt, CMI

Director, State & Local Tax
ADT Security Services, Inc.
Boca Raton, FL

4:00 p.m. – 5:15 p.m.

Sales Tax Concurrent Sessions

Puerto Rico's Sales Tax (Repeated from 1:00 p.m.)

Improving Your Function's Corporate Visibility (Repeated from 1:00 p.m.)

Emerging Tax Trends/Issues (Repeated from 1:00 p.m.)

Tuesday, June 24, 2008

7:00 a.m.- 2:00 p.m. Registration Continues

7:00 a.m. - 8:00 a.m. Exhibits Open

Coffee and pastries will be available with the exhibitors (included in conference registration fee). Spouses/guests register for this event via supplemental fee. Admittance is by badge only.

**8:00 a.m. – 9:30 a.m.
Joint General Session**

Generations in the Workplace - Managing the Mix. The rules, roles, and players have changed.

Today, with four distinct generations of employees in the workplace, the potential for conflict has never been greater. Each generation has their own distinct values and beliefs. How do we “manage the mix?” It’s a new game with new players and the rules are changing! Knowing what motivates each generation and developing operational practices can help any tax department. The ability to bring generations together is a critical factor for today’s business success. This speaker’s creative approach is interactive, engaging and is a big hit with all generations. You’ll leave this session understanding:

- Common characteristics of each generation
- Specific leadership needs of each generation
- The new definition of company loyalty
- Fresh guidelines for team building and motivating entire organization

Speaker:

Karen McCullough, CSP

President
Karen McCullough & Company
Houston, TX

Tuesday, June 24, 2008, continued

9:45 a.m. – 10:45 a.m.
Joint General Session

Business Ethics, Corporate Responsibility and the Tax Professional

Speakers:

Linda K. DiSantis, Esq.
Chief Executive Officer
ethicsLINC, LLC
Atlanta, GA

David F. Golden, Esq.
Partner
Troutman Sanders LLP
Atlanta, GA

11:00 a.m. – 12 Noon
Concurrent Income Tax General Session

UDITPA: Past, Present and Prediction of Future

An up-to-date session regarding the proposed amendments to UDITPA.

UDITPA, adopted in 1957, is the source of much discussion. The proposed amendments are beginning to concentrate on updating the nearly 50-year-old Act to reflect the current business environment. The increasingly complex nature of today's business transactions are leading state legislatures and state departments of revenue to continually change state tax law and related state regulations, which apply pressure to update UDITPA. This presentation will present some of the potential amendments to UDITPA (such as sourcing rules and apportionment factor weighting) while providing the attendees with an update on the current developments from the ULC drafting committee that met in May 2008.

Speakers:

Charles A. Trost, Esq.
Partner
Waller Lansden Dortch & Davis LLP
Nashville, TN

Benjamin F. Miller, Esq.
Counsel, Multistate Affairs, Legal Division
California Franchise Tax Board
Rancho Cordova, CA

11:00 a.m. – 12 Noon
Concurrent Property Tax General Session

Property Tax Policy Issues - A National Survey

The panel will review major property tax policy issues around the country, including a discussion of trends to reduce reliance on property tax in favor of other revenue means (i.e. TX margins tax, OH CAT tax, MI, etc.).

Speakers:

Jeffery S. Binkley
Managing Director, Property Tax Services
Thomson Property Tax Services
Atlanta, GA

Burt Manning
Chief Appraiser
Fulton County Board of Assessors
Atlanta, GA

Stacey L. Sprinkle, CPA
VP – State Tax Policy, MW Area
Verizon
Englewood, CO

11:00 a.m. – 12 Noon
Concurrent Sales Tax General Session

Transactional Taxes in Global Companies

This session will highlight the various challenges and opportunities of centralizing the transactional tax function in a SALT environment.

Speakers:

Michael Woznyk
Senior Manager - Transaction Taxes
United Technologies Corporation

Exhibits Open 12:00 Noon-2:30 pm

Farmington, CT

Richard J. Prem, CPA
Vice President - Indirect Taxes & Tax Reporting
Amazon.Com
Seattle, WA

12 Noon-1:00 p.m.
Lunch in Exhibit Hall/IPT 2008-2009 Committees

(Included in registration fee for all conferees). Any member interested in serving on one of IPT's committees may sit at that committee's table to learn about the committee's proposed activities for 2008 – 2009. Committee tables have been designated in the hall.

Tuesday, June 24, 2008, continued

1:00 p.m. – 2:15 p.m. Joint General Session

Nexus! What's Next?

It's been 16 years since the U.S. Supreme Court declared in Quill that "physical presence" was the rule for tax nexus. Now, we have bright line nexus, economic nexus, "more than one day in the state" nexus, and variations of those rules, which may have implications for income, property, or sales taxes. This session will highlight recent court cases (especially in income tax), legislative responses, and what is likely to happen next.

Speaker:

Maryann B. Gall, Esq.

Partner
Jones Day
Columbus, OH

2:30 p.m. – 3:30 p.m. Joint General Session

Tracking Legislative Bills

During every legislative session, there are many federal and state legislative tax bills drafted, sent to legislative committees for approval, and ultimately sent to the governor for approval. This session will provide general information on federal and state legislative tax bills, the importance of tracking legislative bills, and why tax professionals should utilize available tools to retrieve and monitor various tax bills. At the end of the session, we will demonstrate IPT's state legislative and regulatory tracking tool, including access to *State Net Capital Journal*. The IPT website gives members with login capability access to the state legislative and regulatory-tracking tool.

Speakers:

David Giusti

Director of Client Services
State Net
Washington, DC

Broderick D. Johnson, Esq.

President
Bryan Cave Strategies LLC
Washington, DC

6:45-7:15 p.m. President's Reception

Admittance is by badge/ticket only.
(Reception is included in conference registration fee). Spouses/guests register for this event via a supplemental fee for dinner.
Admittance is by badge/ticket only.

7:15-10:00 p.m. Dinner at the Georgia Aquarium

(Dinner and aquarium admission is included in conference registration fee). Spouses/guests register for this event via a supplemental fee. Admittance is by badge/ticket only.

Wednesday, June 25, 2008

8:00 a.m. – 9:30 a.m. Joint General Session

Should We Stay or Should We Go? Recent Trends in Tax Incentives

During this roundtable presentation and discussion, the panelists will explore current trends in the granting of business incentives. The panelists will specifically address the recent trends of certain state and local governments in granting retention incentives, while other state and local governments only grant incentives for relocation and expansion projects. The panel will also discuss regional trends in business incentive awards and the impact of those trends on the national economy as well as current legal issues that are pending with respect to business incentives awards.

Speakers:

Scot Butcher

Managing Director, Business Incentives Advisory
Duff & Phelps, LLC
Boston, MA

Robert D. Butterbaugh, CMI, CPA

Manager, Global Grants, Incentives & Property Taxes
E.I. Du Pont De Nemours & Company
Wilmington, DE

Daniel M. McRae, Esq.

Public Policy Committee Chair
Georgia Economic Developers Association
Partner, Seyfarth Shaw LLP
Atlanta, GA

5:00-7:00 p.m. Special Admission to the Georgia Aquarium to tour facility prior to dinner

(Admission is included in conference registration fee). Spouses/guests register for this event via a supplemental fee for dinner.

9:45 a.m. – 11:45 a.m. Keynote Session

Create a Character Culture that Will Change Your Tax Department

Upon request, Dr. Beverly Chiodo is speaking again to the Institute. Her presentation stresses the importance of character and integrity. Most people try to motivate others by commending achievement, but commending achievement is not the key to motivation. Recognizing and praising character is the key which brings lasting success, growth, and development. Companies seek to employ men and women of integrity, cooperation, loyalty, and responsibility, but have failed to foster these characteristics in the workplace. Dr. Chiodo demonstrates that a person's principles influence their choices and becomes the catalyst for success or failure. This presentation will give you the tools to motivate others to excellence by recognizing and commending character.

- Motivate people to respond nobly to life's challenges.
- Express specific ways others have benefited your life and the life of your organization.
- Discover the secret of "going the second mile."
- Create an environment which builds rapport and team spirit.

Speaker:

Beverly A. Chiodo, PhD

Professor, Department of Management
Texas State University
San Marcos, TX

11:45 a.m. **Program Concludes**

IPT Conference Dinner to be held at the



GEORGIA AQUARIUM

The Institute for Professionals in Taxation's 32nd Annual Conference, to be held in Atlanta, Georgia June 22-25, 2008, boasts an exciting dinner event for participants and will be located at the Georgia Aquarium.

Many people know that the aquarium is the world's largest, but it is also home to more aquatic life than any other, such as Beluga whales, live coral, tarpon, batfish, and wobbegong sharks. Attendees will be invited to tour the aquarium from 5:00-7:00 p.m. prior to the dinner.

The conference dinner will be held in the ballroom, where guests can view some of the aquarium's sea animals through two large observation windows. The Georgia Aquarium presents the cuisine of Wolfgang Puck for all its corporate events.

As always, the dinner is included in the registration fee for conference attendees, and is available as an event ticket for spouses or guests.

IPT 2008 Annual Conference Committee

Overall Chair:

Michele D. Swanson, CMI, Tax Director
Turner Broadcasting System, Inc.

Income Tax:

Chair:

Richard J. Ayoob, Esq., Partner
Ajalat, Polley, Ayoob & Matarese

Members:

Mary T. Benton, Esq., Partner
Alston & Bird LLP

Douglas Bryan, Esq., Tax Director
Turner Broadcasting System, Inc.

Barbara Hall, CPA, Manager
Grant Thornton LLP

Kathleen M. Holston, CMI, CPA, Manager, State & Local Taxation
Armstrong World Industries, Inc.

Property Tax:

Chair:

Robert D. Butterbaugh, CMI, CPA, Manager, Global Grants,
Incentives & Property Taxes
E.I. Du Pont De Nemours & Company

Vice Chair:

Deborah A. Dillinger, CMI, Tax Accounting Advisor
FedEx Ground Package System, Inc.

Members:

Brad D. Gorski, CMI, Senior Executive Account Manager
Thomson Tax & Accounting - eProperty Tax

Joshua J. Malancuk, CMI, CPA, Executive
Crowe Chizek and Company LLC

Michael J. Mupo, CMI, CPA, Esq., Executive Director
of Property Tax
Verizon Wireless

Lance K. Rickard, CMI, Senior Vice President of
Assessment Appeals

Assessment Technologies, Ltd

Darlene Sullivan, Esq., Attorney
Popp, Gray & Hutcheson, LLP

Sales Tax:

Chair:

Kenneth W. Helms, CMI, Manager - Transactional Tax Planning
United Technologies Corporation

Members:

Gregory C. Fuquay, CMI, Senior Tax Manager
AT&T

Garfield A. Grant, CMI, CPA, Senior Tax Manager
DuCharme, McMillen & Associates, Inc.

Randy Holloway, CMI, Director, State & Local Taxes
SMART Business Advisory and Consulting, LLC

Faranak Naghavi, CPA, National Director of Sales and Use Taxes
Ernst & Young LLP

Registration Information

Photo courtesy of the Georgia Department of Economic Development



Any IPT member or employee of a company/firm with member(s) in the Institute may register for the Conference. The registration fee provides for the usual Conference expenses and also includes luncheons, opening reception, Tuesday night events at the aquarium (including dinner), refreshment breaks, and Conference materials. The early registration fee for IPT members is \$575 before May 23, 2008. Registrant saves \$25 if payment is received prior to May 23, 2008. The Conference

registration fee is \$600 after May 23, 2008. Individuals who are not members of IPT, but whose company or firm has members in IPT, may attend the Conference for an additional \$200 charge. In this case, the total Conference fee for nonmembers would be \$775 before May 23, 2008, and \$800 after May 23, 2008.

If the registrant so elects, he or she may join as a Sales Tax Associate or Property Tax Associate Member (providing their company already has a member in IPT) for annual dues of \$225. In this case, the total Conference fee would be \$800 before May 23, 2008, and \$825 after May 23, 2008. For introductory membership dues of \$150, one may join IPT as an Income Tax Member providing their company already has a member in IPT. In this case, the total Conference fee would be \$725 before May 23, 2008, and \$750 after May 23, 2008.

Dues are nonrefundable even if registration is cancelled. Please see registration form. Members may also register for the conference online at IPT's website, www.ipt.org. You will be required to login to the "members' only" section of the IPT website. If you do not know your login and password, please follow the instructions on the login page.

Faxed registrations are subject to the payment due date and cancellation fees. There is a cancellation charge of \$100. Any faxed registration that is not cancelled in writing prior to the June 13, 2008 cut-off date is subject to the entire Conference fee.

All requests for refunds must be in writing. No refunds for cancellations will be given after June 13, 2008 (5:00 p. m. EST). 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 late registration fee. Admission to all social functions and sessions is by display of badge (tickets when applicable). For more information regarding administrative policies such as complaint and refund, please contact our office at 404-240-2300.

There is a substitution charge of \$40 on or before May 23, 2008; it becomes a \$50 charge after that date (a substitute must be someone from your company). All registrations must be paid in full within three weeks of acceptance and prior to Conference (\$25 surcharge applies to any payment received after May 23, 2008; \$50 surcharge if payment is still outstanding as of June 27, 2008). Confirmation of acceptance will be sent.

All fees must be in U.S. funds. The following credit cards may be used: American Express, VISA, and Master Card. In order for credit cards 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.

Conference Registration Rebate:

IPT members may invite a non-member from another tax discipline which does not currently have any members from that tax discipline in IPT and receive a \$150 rebate off your conference registration fee. You must be an IPT member to participate in this rebate offer. The individual you invite must work for a company that has IPT membership, but does not have an individual member in the tax discipline of the invited individual.

On your registration form, provide the name of a non-member colleague from a tax discipline which does not have any current members in IPT, and, if they attend, you will receive a \$150 rebate. They must register, pay in full, and attend the entire conference for you to receive your \$150 rebate.

To qualify, you must submit your colleague's name with your original registration form. Your non-member colleague must not have been a former member of IPT in the last 12 months and must participate as a full conference registrant. Once we have verified your colleague's attendance, you will receive the rebate. Rebates will only be issued to the person or company that paid the registration, and via the same method as the original payment. Rebates will be issued after the conference and no later than June 30, 2008.

How the rebate works – You are an IPT Property Tax member in good standing. Within your company/firm you also have an IPT Sales Tax member, but no one within your company/firm belongs to the Institute under the Income Tax discipline. The Income Tax attendee would be the colleague whom you would refer to attend the conference and for whom you would receive a rebate after the conference.

Make checks payable to:

Institute for Professionals in Taxation. Mail payment to:
Institute for Professionals in Taxation
1200 Abernathy Road, NE, Building 600, Suite L-2
Atlanta, GA 30328

Telephone: 404-240-2300

Fax: 404-240-2315

Hotel Information and Reservations:



The Institute's Annual Conference is being held at the Omni Hotel at CNN Center, offering an unforgettable setting within the bustling CNN World Headquarters. The elegant Omni Hotel opens its doors to all that is Atlanta. Centrally located in the heart of one of the nation's most vibrant cities, this luxury hotel connects you to the world. And while this sophisticated hotel is equipped with the most modern amenities, you'll discover a level of hospitality that embodies the warm spirit of the South. **Make your reservations early to ensure availability. Accommodations requested after June 10, 2008, or sooner if the block sells out, cannot be ensured.** Reserve your accommodations directly with the Omni Hotel by using one of the following methods:

- **TELEPHONE** your reservation to the hotel (identify yourself with IPT): (1-800) 524-0500
- **ONLINE** reservations can be made by clicking on the following link: [IPT ANNUAL CONFERENCE 2008](#)

The guest room rate is **\$185** per night for **single or double occupancy**. All rates are subject to prevailing taxes. There is a \$20 charge for an additional person; however, there will be no charge for children under 17 years of age who share a room with their parents utilizing existing bedding. All reservations must be guaranteed by a valid major credit card. Individual cancellations will be accepted up to seventy-two (72) hours prior to arrival. At check in, an early departure fee of \$75 will be charged for guests who depart one or more days prior to their scheduled departure date. The check-out time is 12 noon; check-in is after 3:00 p.m. The charge for valet parking is \$30 for overnight parking for all vehicles. No self parking is provided by the hotel. If you have further questions, contact the hotel by calling (404) 659-0000.

Spouse/Guest Information:

Conferees who bring their spouse/guest to the Conference are required to pay for the events attended by the spouse/guest. The optional IPT events available are the Opening Reception (\$35),

Tuesday night events at the aquarium, including dinner (\$90), and coffee and pastries with exhibitors on Monday and Tuesday (\$15).

Continuing Education Credits:

Approximately eighteen (18) CPE credits (including 1 IPT ethics credit hour) are available for full attendance Monday through Wednesday.

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. Website: www.nasba.org. In accordance with the standards of the National Registry of CPE Sponsors, CPE credits have been based on a 50-minute hour.

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.

CMI's will receive hour for hour continuing education credits for actual session attendance.

Transportation: The Omni Hotel is located 12 miles from the Atlanta Hartsfield-Jackson International Airport. **Transportation options from the airport: Taxi Service:** Approximately \$30 each way/\$2 additional per person. **The Atlanta Link, LLC** shuttle provides transportation to and from the airport. Their ticketing counter is located in the Arrivals Lobby of the airport. The loading area is located outside of Delta Baggage Claim South Terminal in the middle island. All ticket sales are non-refundable. Services from the hotel, after 5:00 p.m., require an advanced reservation. Reservations can be made by calling their office at (404) 524-3400 or on-line at www.theatlantalink.com

Dress: For the Conference dress is business casual, with a reminder; meeting room temperatures and personal comfort ranges vary widely. Since meeting rooms always seem cool, please bring a sweater or jacket.

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

Prerequisites: None ■ Program Level: Multiple
Field of Study: Taxation & Regulatory Ethics
Instructional Method: Group Live
Advanced Preparation Required: None