

IPT ADVANCED PROPERTY TAX ACADEMY

FORMULATING EFFECTIVE SOLUTIONS TO TODAY'S TAXING PROBLEMS



Managing the Challenges in Property Tax

PRELIMINARY PROGRAM
JANUARY 27 - 30, 2008
HYATT REGENCY IRVINE
IRVINE, CALIFORNIA





Property Tax Academy

Managing the Challenges in Property Tax Preliminary Program ~ January 27 - 30, 2008

This academy addresses significant issues facing property tax professionals today. Attendance is limited to property tax professionals who hold the CMI designation or have seven or more years of property tax experience. Participation is limited to no more than 75 professionals to allow for a more intimate learning experience. The academy consists of general session presentations on selected topics and also incorporates small breakout sessions

addressing specific issues. The issues chosen include topics important to both corporate and non-corporate tax professionals.

The breakout groups assist experienced tax professionals in formulating effective solutions to problematic issues. This group format ensures that solutions reflect a diversity of thoughts and analyses. Participation is guaranteed through a process that promotes understanding of the issues, encourages creative thinking and supports cooperation.

Sunday, January 27, 2008

4:00 pm - 7:00 pm Registration
6:00 pm - 7:00 pm Welcome Reception

Monday, January 28, 2008

6:30 am - 7:45 am Continental Breakfast
(Guests of Hotel only)
7:00 am Registration Continues
8:00 am - 8:30 am Opening of Academy

Welcome:

Rolston A. Dyer, CMI,
IPT President

Samuel P. Birchfield, CMI,
Chair, Property Tax Academy

8:30 am - 9:00 am **Introduction to Course Format and Explanation of Procedures**

The Academy provides an enriching experience for the seasoned property tax professional through a stimulating blending of presentations on timely topics and problem-solving sessions.

- Presentations update participants on topics designed to enhance their professional skills.
- Problem-solving sessions pool the experience and expertise of skilled practitioners to define the industry-

standard solution to the problems. This session briefly outlines these activities.

Chair, 2008 Property Tax Academy **Samuel P. Birchfield, CMI**

Principal
Ryan & Company
Dallas, TX

9:00 am - 11:50 am **Communicating in Today's Business Environment**

Communication is one of the most important aspects of our everyday lives. Verbal, nonverbal and written communications are a few of the ways we interact with people each day. Do you always get the response you desired? Are some forms of communication more difficult for you than others? Do you avoid writing that report until the last minute? In this session, we will look at some of the pit-falls of communication and remind you of skills you forgot you had and possibly add some new ones along the way.

Speaker:

Judy B. Birchfield
Senior Consultant
Ryan & Company
Dallas, Texas

11:50 am - 12:15 pm Break – return calls, check email, etc.

Monday, January 28, 2008, continued

12:15 pm - 1:05 pm Group Luncheon

1:05 pm - 2:15 pm **After Lunch
Presentation and Discussion (Sales and Property)**

Merging sales tax, property tax and income tax concepts and the crossovers from states and companies may leave us bewildered at how to define nexus or applicable law in each of these disciplines and what the controlling remedies are to resolve our tax controversies. This enlightening presentation will be followed by an interactive breakout session at our tables to share experiences with Sales and Property Tax attendees.

- Merging of Sales, Property and Income Tax Concepts
- Interplay Between Sales, Property and Income Decisions (e.g. Examples: crossovers from states and companies)

Speaker:

Richard J. Ayoob, Esq.

Attorney
Ajalat, Polley, & Ayoob & Matarese
Glendale, CA

2:30 pm - 5:30 pm **Interactive Structured
Breakout Groups (Question 1)**

Participants actively brainstorm with a facilitator to analyze the important characteristics of an issue facing the industry. The group exercise continues to identify and refine a set of action points designed to best resolve the issue. All participants will have a hand in crafting the best practice answer. Full participation in this endeavor is required of all Academy registrants. Participants must remain in the session until the completion of the group exercise.

6:00 pm Social Hour

Tuesday, January 29, 2008

6:30 am - 7:45 am Continental Breakfast
(Guests of Hotel only)

8:00 am - 11:45 am **Interactive Structured
Breakout Groups (Question 2)**

Tuesday, January 29, 2008, continued

11:45 am - 12 noon Break – return calls,
check email, etc.

12:00 Noon - 1:00 pm **Group Lunch**

1:00 pm - 2:00 pm **Joint After Lunch
Presentation with Sales Tax Academy**

Ethics in Government

Join IPT's group lunch with both Sales and Property Tax attendees for an interactive discussion on Ethics to obtain the ethics credits required by IPT and other organizations. The program will include various ethical situations dealing with lobbyists, tax policy and the legislative process. An interactive discussion will take place to identify IPT canons that are controlling and the proper actions to alleviate the situation.

Speakers:

Peggy Kerns

Director, Center for Ethics in Government
National Conference of State Legislatures
Denver, CO

Joseph A. Vinatieri, Esq.

Attorney/Partner
Bewley, Lasseben & Miller, LLP
Whittier, CA

2:15 pm - 5:30 pm **Interactive Structured
Breakout Groups (Question 3)**

Wednesday, January 30, 2008

6:30 am - 7:45 am Continental Breakfast
(Guests of Hotel only)

8:00 am - 12 noon **Summarization of
Findings**

This final session assimilates the results of the earlier group exercises into an Academy consensus on the solution to the problems explored. Through a spirited interchange, participants hone the recommended strategies into a set of best practices designed to establish benchmarking standards to enhance the efficiency of individual property tax operations and departments.

12 Noon Academy Conclusion