Tax Planning for Individuals Conference

6 Reasons You Should Register Now:

1. The Speakers: Meet **Camille Siano Enders,** the Taxpayer Rights Advocate from NYS who will give the keynote address, plus speakers specializing in employee benefits, tax accounting and law.

2. Key Topics: We have carefully crafted the Conference to answer your most pressing tax questions on hot button issues including Generational Wealth Transfer • Tax Effects of Obamacare • International Tax • Retirement Planning

3. Invest in Your Success: You will leave the conference with practical tips and techniques you can put to work every day in your practice—a great way to better serve your clients and grow your practice. Plus you earn 8 CPE credits toward your annual requirement.

4. Networking: Each FAE Conference provides you with the ability to mingle with some of the most respected professionals in our field and to build your network of colleagues.

5. Location: The NYC Bar Association is conveniently located just steps from Grand Central Station at 42 West 44th Street.

6. Attention to Detail: Register for the Tax Planning for Individuals Conference feeling assured that everything will be taken care of for you. FAE strives to provide a rewarding CPE experience so you can focus on your professional development.

HOW TO REGISTER

- Online at www.nysscpa.org/TaxPlan14
- By phone at (212) 719-8383 or (800) 537-3635

See nysscpa.org for registration policy

14 Wall Street, 19th Floor
New York, NY 10005
www.nysscpa.org
1-800-nysscpa

Foundation for Accounting Education
FAE
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Tax Planning for Individuals Conference

Wednesday, July 9, 2014
New York City Bar Association
42 West 44th Street, New York, NY 10036
(also available via Live Webcast)

PROGRAM DETAILS:

Time: 8:45 a.m.–4:50 p.m. (Check-in begins at 8:00 a.m.)
Field of Study: Taxation
Recommended CPE Credit Hours: 8
Course Code: 25620512 (In-Person); 35620512 (Live Webcast)
Member Fee: $385 (In-Person); $285 (Live Webcast)
Nonmember Fee: $510 (In-Person); $410 (Live Webcast)

WHO SHOULD ATTEND?

CPAs, CFPs, CLUs, attorneys, security analysts, and other financial professionals with individual and self-employed clients.

WHY YOU SHOULD ATTEND:

To get an update on the impact of recent legislation and tax law changes and to gain insight into today's planning strategies for individual clients.

Visit www.nysscpa.org/TaxPlan14 or call 800-537-3635 to register!

14-0050

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New York City Bar Association
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Tax Planning for Individuals Conference

New Tax Laws = New Tax Strategies

Keynote Speaker

Camille Siano Enders, JD
Deputy Commissioner and Taxpayer Rights Advocate, *NYS Department of Taxation and Finance* on "Perspectives from the NYS Advocate"

Find Out

- How will Obamacare impact taxes for your clients?
- The ins and outs of generational wealth transfers
- Retirement planning designs, planning issues and techniques
- What you need to know about FinCEN Form 114, the Form 8938, and FATCA

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Tax Planning for Individuals Conference

New Tax Laws = New Tax Strategies

WEDNESDAY, JULY 9, 2014 – PROGRAM

8:15–8:45 A.M. — Good Morning !

Check-in, Continental Breakfast and Networking

8:45–8:50 a.m. — Welcoming Remarks

Conference Co-chairs: Henry A. Garris, CPA, Full-time Faculty, *Touro College*
Barry S. Kleiman, CPA, Tax Principal, *Untracht Early LLC*

8:50–10:00 a.m. — New York State Tax Update

Mark Klein, JD, Partner, *Hodgson Russ LLP*

New York generates huge amounts of revenue from audits of nonresidents. Learn about the impact of new cases, rulings, and audit initiatives targeting individuals who live out of state.

10:00–11:00 a.m. — Generational Wealth Transfer

Susan R. Schoenfeld, JD, LL.M. (Taxation), CPA, MBA, *Wealth Legacy Advisors LLC*

This session will focus on the integration of generational wealth transfer from both the tax/legal side and the personal family dynamics side. We will discuss not just crafting the estate plan but communicating it to, and with, the next generation, and designing it in a way that best reflects the family's values and legacy. Practitioners counseling the ultra-high net worth market must address these issues and provide advice accordingly.

11:00–11:15 a.m. — Break

Find out more at www.nysscpa.org/TaxPlan14

11:15 a.m.–12:15 p.m. — Federal Tax Update

Jeffrey Jacobs, Director, *EisnerAmper LLP*

In these unstable economic times, it seems a certainty that the government aims to tax and collect more of your clients' income. This program highlights the steps your clients can take to protect their income from legislation and regulations – both recently enacted as well as proposed.

12:15–1:00 p.m. — Luncheon

1:00–2:00 p.m. — Keynote Address: The Taxpayer Rights Advocate Perspective

Camille Siano Enders, JD, Deputy Commissioner and Taxpayer Rights Advocate, *NYS Department of Taxation and Finance*

The New York State Taxpayer Rights Advocate will share her experiences and perspective on the progress the office has made and how practitioners and the Department can best resolve pressing and difficult issues.

2:00–2:50 p.m. — Tax Effects of Obamacare

Daniel Gibson, CPA, M.S.T., Partner, *EisnerAmper LLP*

This course will review the principal provisions of the Affordable Care Act and will examine its tax impact on individuals and businesses, including:

- Individual and Employer Mandates
- Premium Assistance Credit
- Medicare Surtax
- Net Investment Income Surtax
- Reporting Requirements

For Group Discounts, call 800-537-3635

2:50–3:05 p.m. — Break

3:05–3:55 p.m. — International Tax Update

Ryan Dudley, CPA, CA, CTA, Partner, Practice Leader, International Tax Services Group, *Friedman LLP*

The IRS has never had more tools to obtain information about Americans' offshore investments and taxpayers (and their accountants) have never had a heavier information reporting burden for such investments. We will review recent developments in this area including the new Foreign Bank Account Report (FinCEN Form 114), Form 8938, and FATCA.

3:55–4:45 p.m. — Retirement Planning

Avery E. Neumark, CPA, JD, LLM, Partner, *Rosen Seymour Shapss Martin & Company LLP*

This session will give the most recent update on new design and planning issues and techniques affecting retirement plans and executive compensation.

4:45–4:50 p.m. — Closing Remarks

Committee Chair and Conference Co-chair:
Barry S. Kleiman, CPA, Tax Principal, *Untracht Early LLC*

Agenda and speakers are subject to change. For the latest updates, including speaker bios, visit www.nysscpa.org/taxplan14

Save on this conference with FAEVP

Visit www.nysscpa.org/TaxPlan14 or call 800-537-3635 to register!