

# Tax Institute 2018

The Internal Revenue Service and the Delaware Division of Revenue are proud to sponsor the 42<sup>nd</sup> Annual Federal and State Tax Institutes. The Institutes consist of presentations for tax-return preparers and practitioners and are offered at three Delaware locations during December 2018.

The Internal Revenue Service and the Delaware Division of Revenue are jointly sponsoring the Institutes. The goal of the institutes is to update, clarify, and explain federal and state tax law reporting requirements and any new tax law developments.



## DIRECTIONS:

**University of Delaware - New Castle County**  
**Clayton Hall**  
**100 David Hollowell Drive**  
**Newark, DE 19716**

Take I-95 to exit 1B, Merge onto Rt. 896 North (S. College Ave) towards Newark, turn left at dead end (Main St.), continue on Rt. 896 making a right on New London Road, then a right onto Pencader Way.

**Dover Downs - Kent County**  
**1131 North DuPont Highway**  
**Dover, DE 19901**

[www.doverdowns.com](http://www.doverdowns.com)

Conference Center is located on the Northbound side of Route 13, at Dover Downs Raceway.

**Rehoboth Beach - Sussex County**  
**Rehoboth Beach Convention Center**  
**229 Rehoboth Avenue**  
**Rehoboth Beach, DE 19971**

From DE-1 take Rehoboth Ave/DE-1 Alt E. Make a left onto 2<sup>nd</sup> St, then a left onto Rehoboth Avenue. The convention center is located at 229 Rehoboth Avenue.

## MATERIALS & LAPTOP USAGE:

All Tax Institute materials will be available for download beginning the week before the Tax Institutes. **No CDs or Thumbs Drives will be given out this year.** Laptops are not provided but please feel free to bring your own if you wish. Division of Revenue is not responsible for lost or damaged laptops or for supplying batteries, charging stations or extension cords.

## NJ & PA TAX UPDATES:

New Jersey and Pennsylvania **will not** be presenting at this year's Tax Institutes.

## CERTIFICATES:

Attendees **must sign out** before leaving to receive their CE or CPE credits. **If you do not sign out, no CE or CPE credits will be issued.**

All certificates will be emailed within **2-3 weeks** after the Tax Institute. Please **make sure we have your current email address** if you wish to receive your certificate in a timely manner.

## CPAs - CPE CREDITS:

**Complete attendance during each session is required in order to earn the associated credit.** No half or partial credits will be given. CPAs can earn a maximum of eight (8) CPE credits.

## EA & AFSP Participants - CE CREDITS:

**Complete attendance during each session is required in order to earn the associated credit.** No half or partial credits will be given. EA and AFSP Participants can earn a maximum of six (6) CE credits. **When completing this registration form your name must match the name you used to file for your PTIN#.**

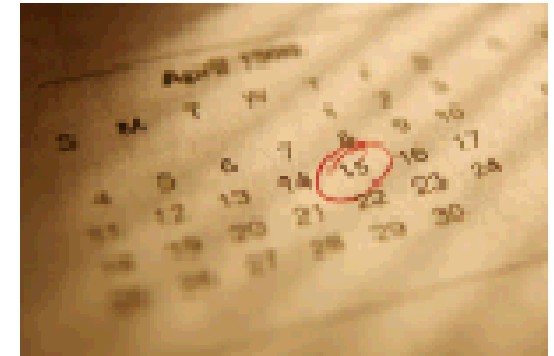
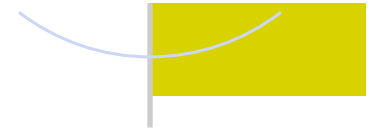
## CERTIFICATE OF ATTENDANCE:

**Complete attendance during each session is required in order to earn the associated attendance hour.** No half or partial hours will be given. Non CPAs can earn a max. of (8) hours of attendance.

**Note:** CPAs, Attorneys, and others licensed by state boards/organizations should check with their respective boards/organizations to determine if these credits/hours apply toward their continuing education requirements.



## **WELCOME TO THE 42<sup>nd</sup> ANNUAL FEDERAL AND STATE TAX INSTITUTES**



**Sponsored by the Internal Revenue Service  
and the Delaware Division of Revenue**



**Delaware Division of Revenue**

# Tax Institute 2018

## SCHEDULED SESSIONS:

- ❖ Delaware Tax Updates
- ❖ 2018 Tax Updates
- ❖ Maryland Tax Updates
- ❖ Practitioner Data Breaches
- ❖ 2018 Tax Practitioner Institute Topics
- ❖ IRC Section 199A
- ❖ Issue Management Resolution System



**EARN UP TO 8 CPE OR 6 CE CREDITS**

## **SPEAKERS:**

### **Internal Revenue Service**

Richard Furlong, Sr. Stakeholder Liaison  
Steve Connor, Stakeholder Liaison

### **Belfint, Lyons & Shuman, P.A.**

Karly A. Laughlin, CPA, Tax Manager  
Valerie Middlebrooks, CPA, Principal  
Jordon Rosen, CPA, AEP, Director – Estates & Trusts

### **Delaware**

Jennifer Hudson, Director of Revenue  
Christie Meaders, Business Tax Systems Manager  
Holly Reynolds, Field Operations Manager  
Elliott Johns, Audit Manager  
Steve Considine, Tax Audit Supervisor  
Rick Jezyk, Tax Audit Supervisor

### **Maryland**

Sarah Dufresne, Manager Legal Section, RAD

## **FEE: \$50.00**

The Registration fee for the Tax Institute is **\$50.00** and includes materials, continental breakfast, and a certificate of completion. Registration and check-in start at 7:30 a.m. The Institute begins **promptly** at 8:00 a.m. and ends at 4:30 p.m.

## **LUNCH:**

**A Country Livin' BBQ Buffet will be available for an additional cost of \$26.00 at the University of Delaware - Clayton Hall location only.**

Lunch includes: Country Glazed Chicken, Sliced Brisket, Four Cheese Baked Macaroni and Cheese, Southern Barbecued Baked Beans, Traditional Slaw Salad, Cornbread Fiesta Muffins, and Assorted Cookies and Dessert Bars.

## **REGISTRATION:**

Complete the attached form to register. Payment must be in the form of Check or Money Order and made payable to the **Delaware Division of Revenue**. Mail registration form and payment to the address listed on the form. Registrations **must** be received by **November 29, 2018**. Late registrations will be accepted on a space-available basis.

## **LOCATION CHANGE:**

Only one change of location per registration is allowed and only when space is available. To change your registration, submit a written request at least five working days before the first of the three Tax Institute dates.

## **WITHDRAWALS AND REFUNDS:**

Withdrawal and refund requests must be submitted in writing. If written notice is received at least five working days before the Tax Institute for which you are registered, the registration fee, will be refunded. No refund will be made after that time. Stopping payment on checks for registration does not constitute an official withdrawal, and there is a \$30 charge for dishonored checks.

## **CANCELLATION:**

We reserve the right to amend or cancel the Tax Institute. In the event of cancellation, you will receive a full refund.

## **Registration Form**

### **PLEASE REGISTER ONLY ONE PERSON PER FORM.**

Photocopy this form as necessary. Payment must accompany this form. For more information, please call (302) 577-8688.

Please indicate the date and location of the Tax Institute you prefer. Registration Fee is **\$50.00**.

- Mon., Dec. 10, 2018 - Rehoboth Beach Convention Center
- Tues., Dec. 11, 2018 - Dover Downs Conference Center
- Thur., Dec. 13, 2018- University of Delaware, Clayton Hall

### **Please Check To Purchase Lunch (\$26.00)**

- University of Delaware - Clayton Hall

Name (Attendee)

Mailing Address

Telephone

E-Mail Address (Required to receive certificate)

PTIN# (Required to receive CE credits)

Please check one of the following:

- CPA                       Enrolled Agent
- Annual Filing Season Program Participant (AFSP)
- Other \_\_\_\_\_

METHOD OF PAYMENT

Check  or Money Order

PAYABLE TO: Delaware Division of Revenue  
820 N. French Street  
Wilmington, DE 19801  
Attn: Carol P. Thomas