



The Accountant

Official Publication

of the North Carolina Society of Accountants

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July 2018



A Message From The President

Jense H. Creighton



Jense H. Creighton

Inside this Issue

Chapter News 2

The Not so Simplified
2018 form 1040 3

IMRS Issues 3

Inside NCSA 4

Meet Your New IRS
Stakeholder Liaison,
Velena McRae 4

Inside NCSA
(continued) 5

Bob Brooks Plans
His Retirement 5

Goodbye Eugenia 5

A Message From The
President
(continued from page 1) 5

PTI Brochure
attached

President Creighton's Acceptance Speech at the 71st Convention Installation Banquet:

Good evening! I would like to take a personal moment to recognize some important people to me.

First my husband and best friend Ben who has been so supportive from the first time he came with me to convention until now. I could not do what I do without you and your encouragement. You are my rock. Our office team –Trina Stahl, Ashlyn Miles, Latrice McRae, Christy Miles, Joni Hough, Mary Fakhori and our office sharing Accountant Peggy Bartsch. Each of you has made it possible for me to be able to serve the office of President of this great society. I thank each of you.

NSA President Brian Thompson and First Lady Anita Thompson, NSA Secretary/Treasurer – Curt Lee, NSA State Director Margie Strider, NCSA Members, Friends and guests.

It is a great honor for me to stand before you tonight as the 2nd Past President and 1st female to be a 2nd term President of the North Carolina Society of Accountants. And I do mean it is an Honor. This society and its members have been a large part of my life for almost forty years. When I was first elected President in June 1994 one of the most important issues facing us then was keeping the NC Accountancy Law- Chapter 93 of the General Status of NC in place. This general statute gives us as non- certified accountants the right to Practice our profession in North Carolina without restrictions.

Our predecessors formed the NC Society of Accountants in 1947 to protect the rights of Non-Certified Accountants. We continue to have the same practice rights now as we did then - 71 years later.

We have been diligent with the help our own, Curt Lee, Jim Holmes and the other members of the Legislative Committee, and our Lobbyist Henry Jones and his son Weldon to protect this privilege. Bob Brooks, Executive Director of the N C Licensing Board of CPA Examiners has been a great friend over these years and continues to meet with us to discuss issues. This year, as in previous years, we had an issue come up with the State Licensing Board for General Contractors. That Board was requesting a rule change that would allow only CPA's to prepare the financial statements to be submitted to their board. The legislative committee caught this and alerted Henry Jones to follow-up on the issue. We contested the issue under the rules of Chapter 93 and argued that the General Contractor Board did not have statutory authority to make this change.

With guidance from the Legislative Committee, Henry represented us before the Administrative Rules Review Commission and pointed out to them our rights in NC under Chapter 93. The Rules Commission agreed with Henry's argument and refused to allow changes to the rules of the NC Licensing Board for General Contractors. This is the reason NCSA is so important to each of us. We, as a Society, must keep focus on the issues that keep each of us working in our chosen profession.

We offer many benefits, quality CPE, mandatory QAR, Networking, a community of accountants that offer a vast amount of knowledge and are willing to share that knowledge and a wonderful assistance committee to help members in the time of need. BUT, our most valuable benefit is our Right to Practice.

(continued on page 5)



Chapter News

If your chapter is meeting and has a speaker please email that information to jawmcneill@gmail.com so we can get the information out to our members. Thank you!

Burlington

The Burlington chapter will meet on Thursday, July 26, 2018 at 6:30pm at... Speaker and topic is TBD. For more information about the Burlington chapter contact Jim Holmes at jholmes.acct@yahoo.com

Cape Fear

The Cape Fear Chapter will meet on Monday, July 16, 2018... Speaker and topic TBD. Cape Fear Chapter meets on the 1st Monday after the 15th of each month. For more information contact Marsha Wheeler at mwheeler14@nc.rr.com

Central

The Central Chapter will meet on Monday, July 23, 2018 at Sagebrush Steakhouse at 6:00pm speaker and topic TBD. On Monday, August 27, 2018 Jonetta Appling with the NCDOR will be speaking with us on some business related items. Central Chapter meets on the 4th Monday of each month. For more information contact Kevin Robinson at kevrob@triad.rr.com

Charlotte

The Charlotte Chapter will meet on Thursday, July 26, 2018 at ... The Charlotte Chapter meets the 4th Thursday each month. For more information contact Trina Stahl at trina@jensehaynes.com

Eastern

The Eastern Chapter will meet on Tuesday, July 24, 2018 at 6:00pm... The Eastern Chapter meets the 4th Tuesday each month. For more information contact Karen Spruill at kspruill@downsouthtax.com

Hickory

The Hickory Chapter will meet on Saturday, July 14, 2018 at 2:00pm with their annual family cookout day at the Lake. Hickory Chapter meets the last Monday of each month. For more information contact Susan Dale Moore at susan@dalesaccounting.com

Piedmont

The Piedmont Chapter will meet Thursday, July 26, 2018. Topic and speaker... Piedmont Chapter meets on the last Thursday of each month. For more information contact David Hooker at dlhacct@triad.rr.com

Raleigh

The Raleigh Chapter will meet on Tuesday, July 24, 2018. The Raleigh Chapter normally meets on the 4th Tuesday of each month. For more information contact Stephen Metelits at metelits@usa.net

Sandhills/Sanford

The Sandhills Chapter will meet not meet again until Tuesday, July 24, 2018... For more information contact April Eads at angelicape@aol.com

Western

The Western Chapter will meet on Tuesday, July 24, 2018... The Western Chapter meets the 4th Tuesday of each month. For more information contact Beth Evans at beth.evans@precisionacct.com

Wilmington

The Wilmington Chapter will meet July ? 2018. For more information contact Susan Corliss-Bland at susan@intrstar.net

**TELL THE ACCOUNTANT WHAT IS HAPPENING IN YOUR CHAPTER. E-MAIL NEWS
TO: jawmcneill@gmail.com OR FAX TO 336-873-7650.**

The Not so Simplified 2018 Form 1040

Form 1040 Simplified Department of the Treasury—Internal Revenue Service **2018** U.S. Individual Income Tax Return

OMB No. 1545-0074 IRS Use Only—Do not write or staple in this space

Married filing separate return Qualifying widow(er) Head of household

Your first name and initial Last name Your social security number

Standard deduction: Someone can claim you as a dependent You were born before January 2, 1954 You are blind

Spouse or qualifying person's first name and initial (see inst.) Last name Spouse's social security number

Standard deduction: Someone can claim your spouse as a dependent Your spouse was born before January 2, 1954 Your spouse is a U.S. citizen or you are a U.S. citizen You are a U.S. citizen and your spouse is a nonresident alien

Home address (number and street, P.O. box, or care of address) Apt. no. I am an Election Campaign contributor. I want \$3 to go to this fund (inst.) You Spouse

City, town or post office, state, and ZIP code. If you have a foreign address, attach Schedule 6. Full-year health care coverage (see instructions)

Dependents (see instructions)

(1) First name	Last name	(2) Social security number	(3) Relationship to you	(4) <input checked="" type="checkbox"/> Qualifies for (see inst.)	Credit for other dependents
					<input type="checkbox"/>

Sign Here Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and accurately reflect my (or my spouse's) income, deductions, credits, and other information on all information provided to me. I am a preparer who has any knowledge of the preparer's tax status. I am a preparer who has any knowledge of the preparer's tax status.

Joint return? See instructions. Keep a copy for your records.

Your signature Date Your occupation

Spouse's signature (if filing jointly) Spouse's occupation

Print/Type preparer's name Preparer's signature PTIN

Firm's name Firm's EIN

Check it: 3rd Party Designee Self-employed

For Disclosure, Privacy Act, and Paperwork Reduction Act Notice, see separate instructions. Cat. No. 112018 Form **1040** (2018)

So the 2018 Tax Cuts and Jobs Act has made many changes to the tax code, changes are also occurring with tax forms, one of the major ones is the Form 1040. Now for 2018 we have the simplified 1040 which is supplemented by Schedules 1 through 6, each of the 1040's prior sections, such as Adjustments to Income, Other Taxes, Third Party Designee and others now have their own schedules!

Check out the draft forms here: <https://apps.irs.gov/app/picklist/list/draftTaxForms.html>

IMRS Issues

Within the IRS, IMRS (Issue Management Resolution System) captures, develops and responds to significant national and local stakeholder issues. When stakeholder organizations notify the IRS of concerns about IRS policies, practices and procedures, analysts research and respond to the issues. Here is a recap of a recent issue provided by our IMRS contact Evelyn Dyson Lee at IRS.

Form 990 EZ and First Time Penalty Abatement

Issue: Client incurred a late filing penalty on a Form 990-EZ. This was the first time they had ever been delinquent in filing or paying, but they were told the First Time Abatement Policy did not apply. Why is this?

Response: The IRS may provide administrative relief from a penalty that would otherwise be applicable under its First Time Penalty Abatement policy (FTA). Under this policy, IRS provides administrative relief from Failure to file (FTF) penalty under IRC 6651(a)(1), IRC 6698(a)(1), or IRC 6699(a)(1) if the qualifying criteria are met. Penalty relief under the FTA waiver does not apply to the daily delinquency penalty (DDP), see e.g., IRC 6652(c)(2) (A) and IRM 20.1.8, Employee Plans and Exempt Organization Penalties. For complete information see IRM 20.1.1.3.3.2.1 First Time Abate (FTA)

Some other recent issues involved Form 2848 being purged from the CAF file, this is done seven years from the signature date of the taxpayer on the form per the Internal Revenue Manual. Another recent issue involved Private Debt Collectors not sending correspondence to third party representatives, which the IRS states is required. Lastly IRS states that they will not send POA's notification when a passport revocation letter is sent to a taxpayer.

becoming a Stakeholder Liaison, worked as an agent in the Abusive Transaction and Tax Avoidance schemes group. Vena has a B.S. Degree in Accounting and a Master's in Business Administration and is also a Professional Registered Parliamentarian.

Inside NCSA

Get to know your new officers and Board Members

Kevin Robinson

NCSA Secretary 2018-2019

I have lived in Colfax (not Colefax as some call it in error), NC community all my life. I am graduate of UNC-G class of 1984 with a B.A. I earned RTRP Designation in October 2012. Thanks to former President Ron Powell and the time he spent in training us in his office in the late summer of 2012. I annually attend the NC State Intermediate Tax Course each year. I am a graduate of Dale Carnegie Leadership Course in 1990 and received Competent Toastmaster in Dec. 1993 by Toastmasters International. I have been married to my wife Sandra for over 23 years. We both attend Kerwin Baptist Church in Kernersville, NC. I was active in the Central Chapter of the NCSA with my Mother, the late Betty Robinson, in the mid to late 80's and early 90's. Then there was a period of years from around 1994-2008 that I was inactive due to other time/schedule obligations. After making the decision to go out on my own full-time in October 2008 in the tax and accounting business, I came back to the Central Chapter and became active again. Going full time on my own in the fall of 2008 through a job loss or job promotion as I call it was the best decision I ever made along with coming back to the NCSA and Central Chapter. I have served as the Central Chapter President the past four years and have learned a lot from the members in it and other chapter members across the state. God's timing, while different than ours, is always perfect. I look back and see the Lord's hand working through the circumstances to prepare me to take over my Mother's tax business and build my own while making sure of her care as an Alzheimer's patient till the Lord called her home in January 2016.

Peggy Bartsch

New Board Member

Peggy Bartsch, Enrolled Agent founded A Step Above Tax and Accounting, LLC in 2009. She has over twenty years of Accounting and Tax experience working with individuals, C-Corps, S-Corps, Partnerships, Non-Profits, and LLCs. In 2014 and 2015, Peggy was elected to serve as Secretary for the Charlotte Chapter of the NC Society of Accountants. Peggy was also elected to Vice President of the NC Society of Accounts for the Charlotte Chapter in 2016. She continues to be the Chairperson for the state NC Society of Accountants annual Tax Practitioners' Forum in Greensboro since 2015. In 2018, she was elected to serve on the state Board of Directors for the NC Society of Accountants. She attended California State University, Fullerton where she earned her Bachelor of Arts degree in Business Administration with a concentration in Finance.

Karen Spruill

New Board Member

Karen Spruill began her first bookkeeping job while she was still in high school and has worked in jobs associated with the accounting profession ever since. Upon graduating from college, Karen spent the next decade as a legal assistant, dealing with collections, foreclosure, real estate, and corporate issues. Next up was a stint as an accounts payable specialist at a national company. Most recently, Karen was the district manager of a major tax preparation franchise, where she not only managed four stores but also prepared tax returns, performed tax resolution services, and taught tax classes. Karen has maintained her commission as a notary for many years. She achieved the IRS's Enrolled Agent status in 2013 and has maintained that designation ever since. She is an active member of the North Carolina Society of Accountants and is currently serving as the president of the Eastern Chapter of that organization. She is also serving on the board of directors of the State association. A native of Elizabeth City, Karen graduated with honors from Elizabeth City State University. In her spare time, she enjoys teaching Sunday School and spending time with her family.

We will feature more member profiles and bios in our next issue!!

Meet Your New IRS Stakeholder Liaison, Velena McRae

As you know Eugenia Tabon retired on June 1st, her replacement is Velena McRae. Here is Ms. McRae's biography: Velena McRae is currently a Senior Stakeholder Liaison in Dallas, TX. She has previously served as an Acting Manager for the Western, Mid-Atlantic, Southwest and Southeast Area Stakeholder Liaison Field Groups. Stakeholder Liaison Field Groups focus on the local engagement of the payroll and practitioner community and stakeholder organizations to provide information about the policies, practices, and procedures the IRS uses to ensure compliance with the tax laws.

Velena started her career with the IRS in 1994, as a Revenue Agent in Dallas, TX. She examined high income taxpayers, large businesses, corporations, and partnerships. For several years, she specialized in Innocent Spouse cases and before becoming a Stakeholder Liaison, worked as an agent in the Abusive Transaction and Tax Avoidance schemes group. Velena has a B.S. Degree in Accounting and a Master's in Business Administration and is also a Professional Registered Parliamentarian.

Velena L. McRae, Senior Stakeholder

Liaison Dallas SB/SE

Velena.L.Mcrae@irs.gov

214-413-5568

1100 Commerce Street

Dallas, TX 75242-1027

Inside NCSA

A great time was had by all at the NCSA 71st Annual Convention at Pine Needles.



Bob Brooks Plans His Retirement

In a review of the May 24th minutes of the NC Board of CPA Examiners *The Accountant* noted that in personnel matters, Robert N. Brooks announced his retirement date as July 31, 2023. Bob Brooks has served as Executive Director of the NC Board of CPA Examiners for many years and as such has attended many NCSA conventions during his tenure. We wish Mr. Brooks the best as he completes his service to the board and plans for a great retirement.



Eugenia Tabon waving goodbye to the IRS on 6/1!

A Message From The President

(continued from page 1)

BUT, our most valuable benefit is our Right to Practice.

So, when you are paying your dues July 1, 2018 maybe send an extra amount and designate it for the Legislative fund. As our deceased friend, and mentor, Past President Carol Estes used as her theme in 1991-92

“We need to support the Profession that supports us”

Again, thank each of you for your support and all you have done to make this a wonderful convention.

NCSA Schedule of Events

2018

July 20—**Leadership Conference**, Pinewood Country Club,
Asheboro 9:00 am

August 23-25—**NSA Annual Meeting**, Minneapolis, MN

October 4-5—**Jennings Business Seminar**,
Embassy Suites Concord

November 13-14—**PTI**, Sheraton 4 Seasons, Greensboro

November 15-16—**PTI**, Ocean Front Resort, Myrtle Beach, SC

2019

August—**NSA Annual Meeting**, Charlotte

2018-2019 OFFICERS

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About PTI

All PTI conferences are the direct result of a collaborative effort of CPAs, EAs, attorneys and public accountants actively engaged in the areas of income and estate taxation.

We sincerely believe the “Practitioner to Practitioner” approach is the most effective way to provide quality CPE.

CONFERENCE MATERIALS

All conference attendees will receive our 2018 federal tax workbook and many additional conference materials.

Attendees also receive our “PTI Quick Reference Chart,” as well as online access to updated workbook text & late year law changes—tools you will find indispensable at your desk.

Registration Information

Who May Enroll

Enrollment is open to all CPAs, EAs, attorneys, accountants, CLUs, trust officers, and other tax professionals regardless of years in practice or experience level.

Information For Registrants

Cancellations more than 30 days in advance will receive a refund of 75%. Cancellations 10 – 30 days prior to the conference will receive a refund of 50%. Cancellations less than 10 days prior to the conference will receive a refund of 25%.

The content of the 1040 continuing education conferences include both tax law update and accounting issues. The conferences are prepared as an update to improve taxation skills for attendees with basic to advanced technical knowledge. The teaching method used in the course is the “group-live” format. Prerequisites for the two day 16 CPE credit hour course are a basic working knowledge in the areas of taxation and accounting.

Stay Connected



www.ptitax.com

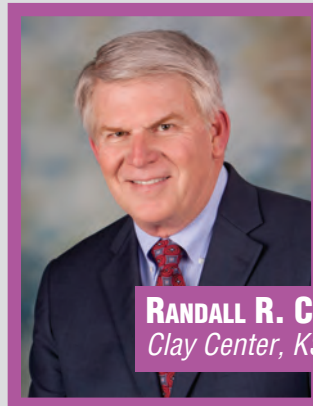


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MEET THE PTI SPEAKERS

PTI Conference speakers present our diverse subject matter in an informative, entertaining manner. If you are tired of presenters that merely read out of the book, then PTI is for you!. With our extensive tax practice experience, we truly understand practitioners’ needs when it comes to continuing education.



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Jobs Act

Professional Tax Institute, Inc. 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. Complaints regarding sponsors may be addressed to National Registry of CPE Sponsors through its website: www.learningmarket.org

PTI has entered into an agreement with the Office of Director of Practice, Internal Revenue Service, to meet the requirements of 31 Code of Federal Regulations, section 101.61(g), covering maintenance of attendance records, retention of program outlines, qualifications of instructors and length of class hours. This agreement does not constitute an endorsement by the Director of Practice as to the quality of the program or its contribution to the professional competence of the enrolled individual.

Professional Tax Institutes, Inc. being approved by the National Association of State Boards of continuing professional education also guarantees acceptance of CPE credits in all other states. PTI also holds a separate license as a continuing professional education provider in the state of New Jersey. With 800 education minutes over the conference period, the Tax Institute is recommended for 16 (CPE) credit hours in taxation. Your state board of accountancy has the final authority on the acceptance of individual courses

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Our 40th Year!

PRACTITIONER TO PRACTITIONER



FROM COAST TO COAST

ALABAMA

Huntsville, AL #2 Oct. 25 & 26, 2018
 Hotel - Holiday Inn Research Park
 5903 University Drive
 Huntsville, AL 35806
Reserv - (256) 830-0600
Rates - \$99.00 + tax
 Room Rate Cut-off Date: TBD
Reference "Alabama Association of Accountants" when making room reservations

Mobile, AL #15 Dec. 3 & 4, 2018
 Hotel - Hampton Inn & Suites
 1028 West I-65 Service Rd South
 Mobile, AL 36609
Reserv - (251) 343-4007
Rates - \$99.00 + tax
 Room Rate Cut-off Date: TBD
Reference "Alabama Association of Accountants" when making room reservations
Alabama information contact:
 Brenda Blevins - cell (256) 509-7926
 Alabama Association of Accountants
 2705 Artie Street Suite 27
 Huntsville, AL 35805
 Phone (256) 880-7225 or
 (256) 880-9881 or
 ashley@brendablevins.com

COLORADO

Grand Junction, CO #7 Nov. 8 & 9, 2018
 Hotel - Doubletree
 743 Horizon Drive
 Grand Junction, CO 81506
Reserv - (970) 241-8888
Reference "Public Accountants Society of Colorado" when making room reservations

Denver, CO #18 Dec. 13 & 14, 2018
 Hotel - Renaissance Denver Stapleton Hotel
 3801 Quebec Street
 Denver, CO 80207
Reserv - (303) 399-7500
Reference "Public Accountants Society of Colorado" when making room reservations
Colorado information contact:
 Corrin E. Campbell
 1320 Cherryvale Rd.
 Boulder, CO 80303
 Phone (303) 440-3556
 Fax (303) 443-9177

FLORIDA

Ft. Myers, FL #12 Nov. 28 & 29, 2018
 Hotel - Hilton Garden Inn at Airport
 16410 Corporate Commerce Way
 Fort Myers, FL 33913
Reserv - (239) 210-7200
Rates - \$125.10 + tax
 Room Rate Cut-off Date: Oct. 28
Reference "PTI" when making room reservations

Orlando, FL #13 Nov. 29 & 30, 2018
 Hotel - Hilton Orlando/Altamonte Springs
 350 S. Northlake Blvd
 Altamonte Springs, FL 32701
Reserv - (407) 830-1985
Rates - \$129.00 + tax
 Room Rate Cut-off Date: Nov. 15
Reference "PTI" when making room reservations

Fees - \$400.00 received by Nov. 15
 \$440.00 received after Nov. 15

GEORGIA

Savannah, GA #16 Dec. 6 & 7, 2018
 Hotel - Embassy Suites-Historic District
 605 W Oglethorpe Avenue
 Savannah GA 31401
Reserv - (912) 721-6900
Rates - \$149.00 + Tax
 Room Rate Cut-off Date: Nov. 14
Reference "PTI" when making room reservations

Fees - \$400.00 received by Nov. 22
 \$440.00 received after Nov. 22

HAWAII

Kahului, Maui #19 Jan. 8 & 9, 2019
 Hotel - Maui Beach Hotel
 170 Kaahumanu Avenue
 Kahului, HI 96732
Phone - (808) 877-0051
Registration and information contact:
 Colleen M. Takamura, CPA
 2145 Wells Street Suite 402
 Wailuku, HI 96793
 Phone - (808) 242-4600
 Fax - (808) 242-4607

Hawaii, Hilo #20 Jan. 9 & 10, 2019
 Hotel - Hilo Hawaiian Hotel
 71 Banyan Drive, Hilo, Hawaii
 96720
Phone - (808) 935-9361
Registration and information contact:
 Valerie Peralto, CPA
 PO Box 763, Hilo, HI 96721
 Phone - (808) 961-3462
 Fax - (808) 961-3571

Honolulu, Oahu #21 Jan. 10 & 11, 2019
 Hotel - Pagoda Hotel
 1525 Rycroft Street
 Honolulu, HI 96814
Phone - (808) 948-8370
Registration and information contact:
 Walter T Y Lau
 2308 Liloa Rise
 Honolulu, HI 96822
 Phone - (808) 216-1128

KANSAS

Manhattan, KS #1 Oct. 23 & 24, 2018
Location - K-State Alumni Center
 1720 Anderson Avenue
 Manhattan, KS 66506
Conference Registration Fees:
Fees - \$400.00 received by Oct. 10
 \$440.00 received after Oct. 10

Sleeping Rooms Available at:
 Holiday Inn @ the Campus
 1641 Anderson Avenue
 Manhattan, KS 66502
Reserv - (785) 539-7531
Rates - \$105.00 + tax
 Room Rate Cut-off Date: Sept. 22
Reference "PTI" when making room reservations

LOUISIANA

Shreveport, LA #14 Dec. 3 & 4, 2018
 Hotel - Horseshoe Casino-Caesars Property
 711 Horseshoe Boulevard
 Bossier City, LA 71111
Reserv - (800) 895-0711
Rates - \$59.00 + tax
 Room Rate Cut-off Date: Nov. 12
Reference "PTI" and code above when making room reservations

Fees - \$400.00 received by Nov. 19
 \$440.00 received after Nov. 19

NORTH CAROLINA

Greensboro, NC #9 Nov. 13 & 14, 2018
 Hotel - Sheraton Greensboro
 at Four Seasons
 3121 West Gate City Blvd.
 Greensboro, NC 27407
Reserv - (336) 292-9161
Rates - \$139.00 + tax
 Room Rate Cut-off Date: Oct. 14
Reference "Ask for group reservations" when making room reservations

Fees - \$400.00 received by Oct. 30
 \$440.00 received after Oct. 30

OHIO

Perrysburg, OH #3 Oct. 29 & 30, 2018
 Hotel - Holiday Inn French Quarter
 10630 Fremont Pike
 Perrysburg, OH 43551
Reserv - (419) 874-3111
Rates - \$109.00 + tax
 Room Rate Cut-off Date: Sept. 30
Reference "PTI" when making room reservations

Fees - \$400.00 received by Oct. 15
 \$440.00 received after Oct. 15

Sandusky, OH #4 Oct. 30 & 31, 2018
 Hotel - Sawmill Creek Resort
 400 Sawmill Creek
 Huron, OH 44839
Reserv - (800) 729-6455
Rates - \$129.00 + tax
 Room Rate Cut-off Date: Oct. 7
Reference "PTI" when making room reservations

Fees - \$400.00 received by Oct. 16
 \$440.00 received after Oct. 16

Hudson, OH #5 Oct. 31 & Nov. 1, 2018
 Hotel - Hilton Garden Inn
 Cleveland/Twinsburg
 8971 Wilcox Drive
 Twinsburg, OH 44087
Reserv - (330) 405-4488
Rates - \$129.00 + tax
 Room Rate Cut-off Date: Oct. 16
Reference "PTI" when making room reserv.

Fees - \$400.00 received by Oct. 17
 \$440.00 received after Oct. 17

PENNSYLVANIA

Philadelphia, PA #6 Nov. 1 & 2, 2018
 Hotel - DoubleTree by Hilton-Philly Airport
 4509 Island Avenue
 Philadelphia, PA 19153
Reserv - (215) 365-4150
Rates - \$129.00 + tax
 Room Rate Cut-off Date: Oct. 10
Reference "PTI" when making room reservations

Fees - \$400.00 received by Oct. 18
 \$440.00 received after Oct. 18

SOUTH CAROLINA

Myrtle Beach, SC #10 Nov. 15 & 16, 2018
 Hotel - Ocean Reef Resort
 7100 N Ocean Blvd.
 Myrtle Beach, SC 29572
Reserv - (888) 341-3530
Rates - \$69.00 + tax
 Room Rate Cut-off Date: Oct. 15
Reference "PTI" when making room reservations

Fees - \$400.00 received by Nov. 1
 \$440.00 received after Nov. 1

ATTENTION

Hotel sleeping rooms rates are only guaranteed until the date listed. We suggest you make your hotel reservations as soon as possible to guarantee the availability of the posted rate.

Please check the PTI website for a list of hotels and updates on hotels secured near the location of your choice.

TENNESSEE

Nashville, TN #11 Nov. 26 & 27, 2018
Location - One Century Place Conference Center
 26 Century Boulevard
 Nashville, TN 37214
Conference Registration Fees:
Fees - \$400.00 received by Nov. 12
 \$440.00 received after Nov. 12

Sleeping Rooms Available at:
 Hotel - Embassy Suites
 10 Century Boulevard
 Nashville, TN 37214
Reserv - (615) 552-5440
Rates - \$129.00 + tax
 Room Rate Cut-off Date: Oct. 27
Reference "PTI" when making room reservations

WASHINGTON

Lynnwood, WA #17 Dec. 10 & 11, 2018
 Hotel - Lynnwood Convention Center
 3711 196th Street SW
 Lynnwood, WA 98036
Conference Registration Fees:
Fees - \$400.00 received by Nov. 26
 \$440.00 received after Nov. 26

Sleeping Rooms Available at:
 Best Western Alderwood
 19332 36th Avenue W
 Lynnwood, WA 98036
Reserv - (425) 775-7600
Rates - \$80.00 + tax
 Room Rate Cut-off Date: Nov. 25
Reference "PTI" when making room reservations

WEST VIRGINIA

Charleston, WV #8 Nov. 12 & 13, 2018
 Hotel - Charleston Marriott Town Center
 200 Lee Street East
 Charleston, WV 25301
Reserv - (304) 345-6500
Rates - \$109.00 + tax
 Room Rate Cut-off Date: Oct. 22
Reference "PTI" when making room reservations

Fees - \$400.00 received by Oct. 29
 \$440.00 received after Oct. 29



PTI CONFERENCE REGISTRATION
REGISTER ONLINE TODAY @ www.ptitax.com

Do Not Send This Form if Registering ONLINE
Send Separate Form For Each Attendee

Full Name: _____
 Firm Name: _____
 Mailing Address: _____
 City: _____ State/Province: _____ Zip/Postal Code: _____
 Telephone: () _____
 Email: _____
 CPA EA Other: _____
 PTIN: _____

Please Register Me in Conference Number: _____
 Conference City Location: _____

	Conference Fee:	\$400.00
Late Registration Fee After 2-week cut off date:	\$40	(+) _____
Super Early Bird Discount: (Received by 6/15 \$40)		(-) _____
Early Bird Discount: (Received between 6/16-8/15 \$25)		(-) _____
Paper registration Handling Fee:		(+) \$10.00
Total:		\$ _____

2018 Conference Topics

- **New Legislation: Individual Concerns**
- **Individual Issues**
- **IRS Updates**
- **Rulings and Cases**
- **Divorce**
- **Ethics**
- **Qualified Business Income (QBI)**

- **New Legislation: Business Concerns**
- **Small Business Issues**
- **Entity Comparisons**
- **C Corporations**
- **Retirement Plans – Small Business**
- **Ag Issues & Rural Investments**

