

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.

All research and writing is performed "in house" for Professional Tax Institutes, Inc. 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 2009 workbook jam-packed with reference material, worksheets, client letters, elections, charts and lecture material.

Attendees also receive our laminated "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.

2009 – 1040 Conference Topics

- New Tax Law Update
- Effective Planning for Changing Tax Laws
- New Tax Credits
- IRA Update, Including NEW ROTH Rules
- Distressed & Forced Sales
- Mortgage Interest – Beware of the Traps
- A New Look at Divorce Issues
- Capital Gains & Losses—Effective Tax Planning
- AMT, A Fresh Review
- Basis, A Comprehensive Review
- Pension Plan Update
- Aggressive Pension Planning
- Multi-Entity Planning & Considerations
- Estate Tax Law Changes
- Gifting Strategies to Minimize Estate Tax
- IRS Representation Issues/Effective IRS Correspondence
- Dealing With High Risk Clients
- IRS Audit Trends & Considerations
- Generational Issues
- Practice Management
- Independent Contractor vs. Employee
- Fringe Benefits & the IRS
- Required Minimum Distributions—Pay Attention!
- Business & Professional Ethics
- ...and much, much more!

Meet the PTI Team

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 give us a try. With a combined 125 years of tax practice experience, we truly understand practitioners' needs when it comes to continuing education.



RANDALL R. CARLSON
EA, ABA, ATA, ATP, ECS
President/Speaker



DAVID A. KISHA
EA
Speaker



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PTI Stimulus Plan
4 Ways to SAVE with PTI!
1. No increase in our pricing
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3. Four or more discount
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pti Professional Tax Institutes, Inc.
P.O. Box 728
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Serving Tax Professionals for 31 Years.

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PROFESSIONAL TAX INSTITUTES, INC.
VOLUME 31 NUMBER 1

Dealing With Change:

Are You Ready?



Register today!

If you have questions or need additional brochures about these exciting conferences please contact us at:

1-800-771-1784,
or Professional Tax Institutes, Inc.,
P.O. Box 728, Manhattan, KS 66505



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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 1016(f), 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. has also entered into agreements as a CPE sponsor with the Accreditation Council for Accountancy and Taxation, and the International Board of Standards and Practices for Certified Financial Planners, Inc. PTI is registered as a CPE sponsor with the state boards of Delaware, Illinois, Indiana, New Jersey, New York, Ohio, South Carolina, and Texas. With 800 educational 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.
CPE® and Certified Financial Planner® are federally registered service marks of the Certified Financial Planner Board of Standards, Inc.

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2009-2010 1040 Locations & Calendar

31st Annual Conference

FLORIDA

Tampa, FL #14 Nov. 30 & Dec. 1, 2009
 Hotel - Hilton Garden Inn Tampa East/Brandon
 13305 Tampa Oaks Boulevard
 Temple Terrace, FL 33637
 Reserv - Phone (813) 342-5000
 Rates - \$109.00 Single/Double (\$122.08 Inclusive)
 Room Rate Cut-off Date: Nov. 2
 Reference PTI when making room reservations
 Fees - \$325.00 received by Nov. 11
 \$365.00 received after Nov. 11

Ft. Myers, FL #15 Dec. 1 & 2, 2009
 Hotel - Clarion Hotel
 12635 S. Cleveland Ave
 Fort Myers, FL 33907
 Reserv - Phone (239) 936-4300
 Rates - \$79.00 Single/Double
 Room Rate Cut-off Date: Nov. 16
 Reference PTI when making room reservations
 Fees - \$325.00 received by Nov. 12
 \$365.00 received after Nov. 12

Ft. Lauderdale, FL #16 Dec. 2 & 3, 2009
 Hotel - The Westin Fort Lauderdale
 400 Corporate Drive
 Fort Lauderdale, FL 33334
 Reserv - Phone (954) 772-1331
 Rates - \$89.00 Single/Double (\$98.79 Inclusive)
 Room Rate Cut-off Date: Nov. 1
 Reference PTI when making room reservations
 Fees - \$325.00 received by Nov. 13
 \$365.00 received after Nov. 13

Orlando, FL #17 Dec. 3 & 4, 2009
 Hotel - Clarion Inn & Conference Center
 230 W State Road 436
 Altamonte Springs, FL 32714
 Reserv - Phone (407) 862-4455
 Rates - \$69.00 Standard (\$77.28 Inclusive)
 Room Rate Cut-off Date: Nov. 18
 Reference PTI when making room reservations
 Fees - \$325.00 received by Nov. 14
 \$365.00 received after Nov. 14

GEORGIA

Savannah, GA #12 Nov. 18 & 19, 2009
 Hotel - Coastal Georgia Center
 305 Fahm Street
 Savannah, GA 31401
 Phone - Phone (912) 651-2005
 Conference Registration Fees:
 Fees - \$325.00 received by Oct. 31
 \$365.00 received after Oct. 31

Sleeping Rooms Available at:
 Hampton Inn & Suites
 201 MLK Jr. Blvd
 Savannah, GA 31401
 Phone - Phone (912) 721-1603
 Rates - \$119.00 (\$135.47 Inclusive)
 Room Rate Cut-off Date: Oct. 5
 Guest Parking: \$8.00 per day, per car - RE: PTI

HAWAII

Waikapu, Maui #20 Jan. 5 & 6, 2010
 Hotel - Maui Beach Hotel
 170 Kaahumanu Avenue
 Kahului, Maui, HI 96732
 Phone - (808) 872-9307
 REGISTRATION OR INFORMATION CONTACT:
 Carol S. Uhl
 140 N Market St Ste 200
 Wailuku, HI 96793
 Phone - (808) 242-9100
 Fax - (808) 244-1375

Hawaii, Hilo #21 January 6 & 7, 2010
 Hotel - Hilo Hawaiian Hotel
 71 Banyan Drive
 Hilo, Hawaii 96720
 Phone - (808) 935-9361
 REGISTRATION OR INFORMATION CONTACT:
 Valerie Peralto
 PO Box 763
 Hilo, HI 96721
 Phone - (808) 961-3462
 Fax - (808) 961-3571

Honolulu, Oahu #22 January 7 & 8, 2010
 Hotel - Pagoda Hotel
 1525 Rycroft Street
 Honolulu, HI 96814
 Phone - (808) 948-8370
 REGISTRATION OR INFORMATION CONTACT:
 Robert Fukuhara, Jr.
 1585 Kapiolani Blvd Ste 128
 Honolulu, HI 96814
 Phone - (808) 949-2958
 Fax - (808) 955-2588

IOWA

Cedar Rapids, IA #3 Nov. 2 & 3, 2009
 Hotel - Clarion Hotel & Convention Center
 525 33rd Avenue SW
 Cedar Rapids, IA 52404
 Reserv - Phone (319) 366-8671
 Rates - \$84.00 Single / \$94.00 Double
 Room Rate Cut-off Date: Oct. 15
 Reference PTI when making room reservations
 Fees - \$300.00 received by Oct. 15
 \$340.00 received after Oct. 15

INDIANA

Indianapolis, IN #4 Nov. 3 & 4, 2009
 Hotel - Holiday Inn North at the Pyramids
 3850 DePauw Blvd
 Indianapolis, IN 46268
 Reserv - Phone (317) 872-9790
 Rates - \$109.00 Single/Double
 Room Rate Cut-off Date: Oct. 12
 Reference PTI when making room reservations
 Fees - \$325.00 received by Oct. 16
 \$365.00 received after Oct. 16

KANSAS

Manhattan, KS #1 Oct. 26 & 27, 2009
 Hotel - Clarion Hotel
 530 Richards Road
 Manhattan, KS 66502
 Reserv - Phone (785) 539-5311
 Rates - \$79.00 Single/Double (\$89.01 Inclusive)
 Room Rate Cut-off Date: Oct. 5
 Reference PTI when making room reservations
 Fees - \$300.00 received by Oct. 8
 \$340.00 received after Oct. 8

MISSISSIPPI

Tunica, MS #19 Dec. 8 & 9, 2009
 Hotel - Sam's Town Tunica Hotel & Casino
 1477 Casino Strip Resorts Boulevard
 Robinsonville, MS 38664
 Reserv - Phone (800) 456-0711
 Rates - \$49.00 Single/Double (\$53.90 Inclusive)
 Room Rate Cut-off Date: Nov. 21
 Reference PTI when making room reservations
 Fees - \$325.00 received by Nov. 19
 \$365.00 received after Nov. 19

NEW JERSEY

Atlantic City, NJ #2 Oct. 28 & 29, 2009
 Hotel - Resorts Atlantic City
 1133 Boardwalk
 Atlantic City, NJ 08401-7329
 Reserv - Phone (800) 322-1399
 Rates - \$89.00 Single/Dbt (\$106.46 Inclusive)
 Room Rate Cut-off Date: Oct. 6
 Reference PTI when making room reservations
 Fees - \$325.00 received by Oct. 10
 \$365.00 received after Oct. 10

[RE: Code (VTAXPRO) when making reservations]

NORTH CAROLINA

Greensboro, NC #10 Nov. 16 & 17, 2009
 Hotel - Clarion Hotel Greensboro
 415 South Swing Road
 Greensboro, NC 27409
 Reserv - Phone (336) 299-7650
 Rates - \$79.00 Single/Dbt (\$89.07 Inclusive)
 Room Rate Cut-off Date: Oct. 31
 Reference PTI when making room reservations
 Fees - \$325.00 received by Oct. 29
 \$365.00 received after Oct. 29

CHARLOTTE, NC #11 Nov. 17 & 18, 2009

Hotel - Holiday Inn Airport Charlotte
 2707 Little Rock Road
 Charlotte, NC 28214
 Reserv - Phone (704) 394-4301
 Rates - \$124.00 Single/Double (\$142.91 Inclusive)
 Room Rate Cut-off Date: Oct. 17
 Reference PTI when making room reservations
 Fees - \$325.00 received by Oct. 30
 \$365.00 received after Oct. 30

OHIO

Cincinnati, OH #5 Nov. 4 & 5, 2009
 Hotel - Holiday Inn Hotel I-275 North Cincinnati
 3855 Hauck Road
 Cincinnati, OH 45241
 Reserv - Phone (513) 563-8330
 Rates - \$79.00 Single/Double (\$91.64 Inclusive)
 Room Rate Cut-off Date: Oct. 12
 Reference PTI when making room reservations
 Fees - \$325.00 received by Oct. 17
 \$365.00 received after Oct. 17

Toledo, OH #7 Nov. 9 & 10, 2009
 Hotel - Holiday Inn (French Quarter)
 10630 Fremont Pike, Route 20
 Perrysburg, OH 43551
 Reserv - Phone (419) 874-3111
 Rates - \$99.00 Single/Double/Triple/Quad
 (\$108.41 Inclusive)
 Room Rate Cut-off Date: Oct. 9
 Reference PTI when making room reservations
 Fees - \$325.00 received by Oct. 22
 \$365.00 received after Oct. 22

Sandusky, OH #8 Nov. 10 & 11, 2009
 Hotel - Castaway Bay
 2001 Cleveland Rd.
 Sandusky, OH 44870
 Reserv - Phone (419) 627-2106
 Rates - \$59.00 Double (\$65.79 Inclusive)
 Room Rate Cut-off Date: Oct. 31
 Reference PTI when making room reservations
 Fees - \$325.00 received by Oct. 23
 \$365.00 received after Oct. 23

Hudson, OH #9 Nov. 11 & 12, 2009
 (Formerly Holiday Inn Hudson)
 Hotel - Clarion Inn & Conference Center
 240 E. Hines Hill Road
 Hudson, OH 44236
 Reserv - Phone (330) 653-9191
 Rates - \$79.00 Single/Double (\$90.85 Inclusive)
 Room Rate Cut-off Date: Oct. 19
 Reference PTI when making room reservations
 Fees - \$325.00 received by Oct. 24
 \$365.00 received after Oct. 24

OHIO

Cincinnati, OH #5 Nov. 4 & 5, 2009
 Hotel - Holiday Inn Hotel I-275 North Cincinnati
 3855 Hauck Road
 Cincinnati, OH 45241
 Reserv - Phone (513) 563-8330
 Rates - \$79.00 Single/Double (\$91.64 Inclusive)
 Room Rate Cut-off Date: Oct. 12
 Reference PTI when making room reservations
 Fees - \$325.00 received by Oct. 17
 \$365.00 received after Oct. 17

OHIO

Toledo, OH #7 Nov. 9 & 10, 2009
 Hotel - Holiday Inn (French Quarter)
 10630 Fremont Pike, Route 20
 Perrysburg, OH 43551
 Reserv - Phone (419) 874-3111
 Rates - \$99.00 Single/Double/Triple/Quad
 (\$108.41 Inclusive)
 Room Rate Cut-off Date: Oct. 9
 Reference PTI when making room reservations
 Fees - \$325.00 received by Oct. 22
 \$365.00 received after Oct. 22

OHIO

Sandusky, OH #8 Nov. 10 & 11, 2009
 Hotel - Castaway Bay
 2001 Cleveland Rd.
 Sandusky, OH 44870
 Reserv - Phone (419) 627-2106
 Rates - \$59.00 Double (\$65.79 Inclusive)
 Room Rate Cut-off Date: Oct. 31
 Reference PTI when making room reservations
 Fees - \$325.00 received by Oct. 23
 \$365.00 received after Oct. 23

SOUTH CAROLINA

Myrtle Beach, SC #13 Nov. 19 & 20, 2009
 Hotel - Ocean Reef
 7100 N Ocean Boulevard
 Myrtle Beach, SC 29572
 Phone (800) 542-0048
 Reserv - \$49.00 Single/Double or Efficiency
 Room Rate Cut-off Date: Oct. 30
 Reference PTI when making room reservations
 Fees - \$325.00 received by Nov. 2
 \$365.00 received after Nov. 2

TENNESSEE

Nashville, TN #18 Dec. 7 & 8, 2009
 Conference location is as follows:
 Willis Conference Center
 26 Century Blvd
 Nashville, TN 37214
 Phone (615) 872-6400
 Conference Registration Fees:
 Fees - \$325.00 received by Nov. 18
 \$365.00 received after Nov. 18

Sleeping Rooms Available at:
 Embassy Suites Hotel
 10 Century Boulevard
 Nashville, TN 37214
 Phone (615) 871-0033 or (800) 362-2779
 Rates - \$109 King Non Smoking (\$128.12 Incl.)
 Room Rate Cut-off Date: Nov. 9
 Reference "PTI" when making room reservations

WEST VIRGINIA

Charleston, WV #6 Nov. 5 & 6, 2009
 Hotel - Embassy Suites
 300 Court St.
 Charleston, WV 25301
 Reserv - Phone (304) 347-8700
 Rates - \$144.00 Run of House (\$152.64 Inclusive)
 Room Rate Cut-off Date: Oct. 11
 Reference PTI when making room reservations
 Fees - \$325.00 received by Oct. 19
 \$365.00 received after Oct. 19

ATTENTION

Hotel sleeping rooms rates are ONLY guaranteed till 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.

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Oct. 25, 2009	Oct. 26 Manhattan, KS (PTI)	Oct. 27	Oct. 28 Atlantic City, NJ (PTI)	Oct. 29	Oct. 30	Oct. 31
Nov. 1	Nov. 2 Cedar Rapids, IA (AAI)	Nov. 3 Indianapolis, IN (PTI)	Nov. 4 Cincinnati, OH (OSSEA)	Nov. 5 Charleston, WV (WVPAA)	Nov. 6	Nov. 7
Nov. 8	Nov. 9 Perrysburg, OH (Toledo) (OSSEA)	Nov. 10 Sandusky, OH (OSSEA)	Nov. 11 Hudson, OH (OSSEA)	Nov. 12	Nov. 13	Nov. 14
Nov. 15	Nov. 16 Greensboro, NC (NCSA)	Nov. 17	Nov. 18 Savannah, GA (GAES Coastal Chpt)	Nov. 19 Myrtle Beach, SC (NCSA)	Nov. 20	Nov. 21

Nov. 29	Nov. 30 Tampa, FL (FSA)	Dec. 1 Ft. Myers, FL (FSA)	Dec. 2 Ft. Lauderdale, FL (FSA)	Dec. 3 Orlando, FL (FSA)	Dec. 4	Dec. 5
Dec. 6	Dec. 7 Nashville, TN (PTI)	Dec. 8 Tunica, MS (PTI)	Dec. 9	Dec. 10	Dec. 11	Dec. 12

Jan. 3, 2010	Jan. 4	Jan. 5 Waikapu, Maui (HAPA)	Jan. 6 Honolulu, Oahu (HAPA)	Jan. 7	Jan. 8	Jan. 9
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Registration Information

WHO MAY ENROLL

Enrollment is open to all CFPs, attorneys, accountants, CPAs, enrolled agents, CLUs and trust officers, regardless of years in practice or experience level.

INFORMATION FOR REGISTRANTS

Fees are refunded (less a \$50 service fee per registration) if notification is received at least 7 business days prior to the conference. 50% is refundable thereafter. If you fail to attend (no show) and do not notify us in advance, the full fee is due. Substitutions may be made if we are notified in advance.

The content of the 1040 continuing education conferences includes accounting and taxation issues. The conferences do not require prerequisites or advance preparation and are prepared for attendees with intermediate to advanced technical skills. The teaching method used in the courses is the "lecture & case studies" format. The two day 16-hour course is intended to expand the attendee's knowledge in the areas of taxation and accounting.

PTI Conference Registration

(Additional discount for ALL online registrations)



Phone — Call us today at:
 1-800-771-1784
 or (785) 537-1121

Internet — Access our website at:
 www.ptitax.com

FAX — FAX the completed registration form to: 1-785-539-4609

Mail — Mail the completed registration form to:
 Professional Tax Institutes, Inc.
 P.O. Box 728 • Manhattan, KS 66505

Full Name: _____
 Firm Name: _____
 Mailing Address: _____
 City: _____ State/Province: _____ Zip/Postal Code: _____
 Telephone: () _____ Fax: () _____
 Email: _____
 ADDITIONAL ATTENDEES: _____

 Please register me/us for the Conference in:
 Location: _____
 Number of registrations: _____ @ Fee of: \$ _____ each = \$ _____

Less **Early Bird discount of \$20** each (received and paid by July 31st, 2009)
 Number of registrations: _____ @ (\$20) = _____

Less **Four or More discount**: Four or more people attending from any one firm will qualify for a reduction in registration of **\$20.00** each.
 Number of registrations: _____ @ (\$20) = _____
GRAND TOTAL = \$ _____

Preferred method of Payment:
 Check enclosed to cover the full fee
Make checks payable to: PTI, Inc.

Mail to: **Professional Tax Institutes, Inc.**
PO Box 728
Manhattan, KS 66505-0728

Charge to: VISA MASTERCARD Total \$ _____
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 Cardholder (print) _____
 Authorized signature: _____

ATTENTION: For more information regarding administrative policies such as complaints and refunds, please contact our office at 800-771-1784.

PRACTITIONER to PRACTITIONER