The Georgia Society *of* CPAs

GEORGIA TAX FORUM SAVANNAH

November 30 - December 1, 2016

Coastal Georgia Center, Savannah

Event Code: 13060

A MUST-ATTEND CONFERENCE FOR ALL TAX PROFESSIONALS

The Georgia Society *of* CPAs

GEORGIA TAX FORUM SAVANNAH

November 30 - December 1, 2016

Coastal Georgia Center, Savannah

Event Code: 13060 (both days);

13062 (Wednesday Only); **13063** (Thursday Only);

CPE Credit: Up to 18 hours credit including 4 hours of A&A

17 hours of CFP® (applied for)

The Georgia Tax Forum - Savannah provides you with the knowledge and skills you need to survive the upcoming tax season. Georgia's leading taxation event brings you the most up-to-date information on changes in tax law that impact you and your clients, including the new DOL/FLSA overtime regulations, research and development, foreign compliance issues, leases, and IRS tax fraud. Extend your knowledge with an options early session each morning.

Who Should Attend: CPAs practicing in all areas of tax.

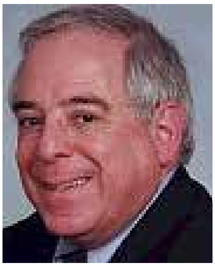
RESERVE YOUR ROOM NOW!

Courtyard Marriott Savannah Historic

Tel: 912-790-8287 | **Deadline: October 29**

Rate: $125 | $10/day Valet Parking

KEYNOTE SPEAKERS



ART AUERBACH, CPA

Arthur Auerbach, CPA, is a retired tax consultant from Goodman and Company of McLean, VA and Atlanta, (now Dixon Hughes Goodman) specializing in tax consulting and financial planning for individuals and closely held businesses. He is a member of The Georgia Society of Certified Public Accountants and a former member of the AICPA Individual Tax Resource Panel. He is a nationally recognized lecturer on a variety of tax topics for the continuing education requirement for CPAs.

DON BRAVALDO, CPA

Bravaldo Capital Advisors

Don founded Bravaldo Capital Advisors in 2006 to provide full-service investment banking to middle market clients, a segment underserved by larger advisory firms. Throughout his career, Don has completed deals across a variety of industries. He has conducted and administered all phases of the mergers and acquisitions process. Prior to founding Bravaldo Capital Advisors, Don let the middle market group at a Southeastern business brokerage and served as the business development manager for Hanger Orthopedic Group, Inc. He is also a former auditor with Bennett Thrasher & Co., PC and Arthur Andersen LLP.

LYNNE RILEY

Georgia Department of Revenue

Commissioner Lynne Riley was appointed by Governor Nathan Deal to serve as the State Revenue Commissioner in January 2015. Lynne comes to the Department of Revenue most recently from the Georgia General Assembly, where she served four years in office as the House District 50 (Johns Creek) Representative. She served as one of Governor Deal's floor leaders in 2014, and as a member of the Ways and Means, Natural Resources and Environment, Retirement and the Metropolitan Atlanta Rapid Transit Oversight committees. Commissioner Riley previously served as the Fulton County Commissioner for District 3 from July 2004 to December 2010.

DAY ONE

WEDNESDAY, NOVEMBER 30, 2016

6:30 – 8 a.m. Registration and Continental Breakfast

7 – 7:50 a.m.
A - A&A Update for Tax People (A&A)
Mike McCarthy, Hancock Askew & Co., LLP, Savannah, Ga.
SSARS 21 includes significant revisions that affect the standards for accountants in public practice who prepare financial statements for their clients and is effective for reviews, compilations, and engagements to prepare financial statements. Learn how to easily navigate and apply the new standards while understanding practice issues and opportunities provided under it.

8 – 8:05 a.m. Welcome and Announcements

8:05 – 9:45 a.m.
B - Tax Update: Current Developments Affecting Business
Art Auerbach CPA, Arthur Auerbach CPA, Atlanta Ga.
Focus on developments to closely-held businesses and their owners, including a thorough review of the most important cases and rulings and how they impact year-end planning for our closely-held business clients, as well as the upcoming busy season. Analyze costs involving repairs v. capitalization and the issue of nexus for sales and income taxes.

9:45 – 10 a.m. Networking Break

10 – 11:40 a.m.
C - Tax Update: Current Developments Affecting Individuals
Art Auerbach CPA, Arthur Auerbach CPA, Atlanta Ga.
Focus on developments of vital importance to individual tax clients with an emphasis on year-end planning. Included is an overview of the expiring tax provisions, as well as any new tax law proposals. Also, what important issues remain unanswered with the “net investment tax” and the continuing impact of the passive loss rules with emphasis on the real estate professional.

11:40 a.m. – 12:40 p.m. Lunch

12:45 – 2 p.m.
D1 - International Tax Reporting Issues: Find Out What You Need to Know
Tigger Marshall, MAcc and James Parks J.D., Bennett Thrasher, Atlanta, Ga.
The IRS continues to protect the U.S. tax base through increased scrutiny on international tax compliance. Learn about the various reporting requirements facing individuals and businesses, and how the tax practitioner can assist their client in satisfying reporting obligations. Focus on FinCEN 114, Form 8938, Offshore Compliance Programs, updates to FIRPTA and various OECD initiatives.

D2 - Social Security 101

Alicia Lipscomb, Social Security Administration, Atlanta, Ga.

Understand the eligibility requirements for retirement, spousal, survivor benefits and Medicare enrollment. You will also learn how to assist clients in creating "mySocialSecurity" accounts in order to plan for the future and manage benefits.

2 - 2:20 p.m. Networking Break

2:20 - 3:10 p.m.

E1 - Income Tax Planning: The Fulcrum for Effective Retirement

Susan Tillery, CPA/PFS, CFP, Paraklete® Financial, Inc., Kennesaw, Ga.

Effective income tax planning during retirement or financial independence has the potential to provide a greater economic benefit than a retiree's rate of return on their investment portfolio. Income tax planning provides significant leverage in all areas of a retiree's personal financial plan including Social Security benefits, health care benefits, required minimum distributions, relocation, and spendable income. Discuss income tax planning for retirees with specific applications and a client case study.

E2 - War Stories from The M&A Trenches: Real World Mistakes That Were Deal Killers

Don Bravaldo, CPA, Bravaldo Capital Advisors, Atlanta, Ga.

Cary Rodin, MPAc, Bennett Thrasher, Atlanta, Ga.

Rick Rosell, CPA, Bennett Thrasher, Atlanta, Ga.

A distinguished panel of CPAs who specialize in mergers and acquisitions will share real-world case studies of issues encountered on transactions and how to avoid potential pitfalls for your clients. Discussion topics will include, but not limited to the value of readiness planning for mergers and acquisitions; the secrets of increasing and decreasing the number of prospect buyers and who benefits; working capital true ups, earn-outs, employment agreements, and the details that matter; what makes for a great M&A attorney; helping your clients realize what life looks like post business sale; and GAAP - not just the difference between a buyer and seller valuation.

3:10 - 3:20 p.m. Networking Break

3:20 - 4:35 p.m.

F1 - The New DOL/FLSA Overtime Regulations and Other Related Issues

Bliss Jones, CPA, CGMA, Jones and Kolb CPAs, Atlanta, Ga.

How do you, or your clients, ensure compliance with DOL regulations? Take a walk through the new DOL/FLSA regulations on overtime, and receive insight on how to determine if you, and/or your clients, have exempt or nonexempt employees. We will also discuss off-the-clock, comp and travel time.

F2 - WTF!: When Tax Season Fires Up! Let's Get Ready to Rumble

Colin Blalock, CPA, CGAM, PFS, CFP, Jones and Kolb, Atlanta, Ga.

Karen Drescher, CPA, Karen C. Drescher CPA PC, McDonough, Ga.

Now is the time to start planning your 2017 tax season. We will address actions and procedures needed before year-end, at the beginning, middle and end of filing season to make this the most successful season ever! New rules, dues dates, and procedures will be addressed for the sole practitioner, small firm and larger firm. What works, doesn't work and how to avoid problems will be addressed by practicing CPAs.

DAY TWO

THURSDAY, DECEMBER 1, 2016

6:30 – 8 a.m. Registration and Continental Breakfast

7 – 7:50 a.m.

G - State of the Profession

Don Cook, The Georgia Society of CPAs, Atlanta, Ga.

The number of legislative initiatives at the state and federal level impacting the profession is significant. With complexity ever increasing, now is the time to be more aware and more vigilant on legislation that can have an impact on your business and your clients. Discuss federal and state initiatives CPAs should be aware of, and will include some "behind the scenes" on what our level of concern should be.

8 - 8:05 a.m. Welcome and Announcements

8:05 - 9:20 a.m.

H - Estate Planning Update

Tony Turner, J.D, CPA, Cohen Pollock Merlin & Small, Atlanta, Ga.

Recent changes in the estate and gift tax laws, including proposed limitations on valuation discounts and new basis consistency rules, have a profound impact on estate planning. Explore those changes and what you should consider when advising you clients about estate planning.

9:20 - 9:35 a.m. Networking Break

9:35 - 10:25 a.m.

I - State Tax Update

Richard C. Litwin, Esq., The Litwin Law Firm, PC, Atlanta, Ga.

The world of state taxation continues to evolve to adjust to changes in business methods. Practitioners must stay abreast of state taxing agency efforts to adapt to these changes, so that practitioners can identify client issues, whether predicaments or opportunities, and then steer their clients in the right direction. Discuss national trends; Georgia state tax developments, including recent Georgia Tax Tribunal decisions; state tax legislation; tax regulations; Department of Revenue letter rulings and Department of Revenue policy bulletins.

10:30 – 11:45 a.m.

J - Improving Customer Service Through Effective Staffing and the Use of Technology

Ronald Johnson Jr., Georgia Department of Revenue, Atlanta, Ga.

Valuable insight into the staffing and technology of the Department of Revenue and the online system used by businesses and individuals in Georgia. The past, present and future of of of the Georgia Tax Center will be addressed.

11:45 a.m. - 1:20 p.m. Lunch

K - Georgia Department of Revenue Update (12:15 - 1:05 p.m.)

Lynne Riley, Georgia Department of Revenue, Atlanta, Ga.

Meet the Commissioner Lynne Riley, and receive an overview of the Department of Revenue, including agency priorities, customer service initiatives, fraud detection efforts, internal procedural changes, and tax law changes. We will also touch on what you may expect during the upcoming tax season.

1:20 - 2:35 p.m.

L1 - State and Local Tax Incentives For Business

Peter Stathopoulos, J.D. and Stephen Bradshaw, CPA, Bennett Thrasher, Atlanta, Ga.

Review tax credits and other economic development incentives offered by GA, NC and SC to incentivize various business activities. Discussion will include transferable state tax credits and the benefits and risks associated with purchasing such tax credits.

L2 - Leases: Not Just for Footnotes Anymore (A&A)

Kelly G. Thrift, CPA, M.B.A., Dixon Hughes Goodman LLP, Atlanta, Ga.

Receive an update on the requirements of the new (2016) lease accounting standard. Designed for accounting managers, controllers, CFOs and those in public accounting seeking a more in depth understanding of the new rules.

2:35 - 2:50 p.m. Networking Break

2:50 - 4:05 p.m.

M1 - Preventing and Detecting Fraud Including Cyberfraud (A&A)

Brian Muia, CPA, Jones and Kolb CPAs, Atlanta, Ga.

Receive an overview of how to build and maintain a fraud resistant organization and discuss the importance of a proper environment and how it impacts the mitigation of fraud risks, as well as the implications of the newer frontier of fraud.

M2 - Research and Development Tax Credit

Betsi Barrett, Bennett Thrasher, Atlanta, Ga.

An introduction to the federal and Georgia R&D tax credits. Gain a basic understanding of the activities that qualify for the R&D tax credit, calculation methodologies, qualifying expenditures, and substantiation requirements. Attendees will be able to identify clients across a variety of industries potentially eligible for the credit.

CLUSTERS

December 8-9, 2016 | Cobb Galleria Centre | Atlanta, Georgia

Choose from 16 different sessions across four tracks of study: **Accounting & Auditing, Tax, Management** and **Technology**.

Mix and match across tracks to gain a breadth of knowledge or deepen your expertise in a specific area of interest by following one track. Get creative with a customized educational experience!

To register: Visit www.gscpa.org or call 404-504-2985 or 800-330-8889, Opt. 3

DON FARMER'S TAX SEMINARS

SHARPEN YOUR TAX KNOWLEDGE

⌘ **Don Farmer's 2016 Federal Tax Update**
November 15, 2016 | CPE: 8 General
Event Code: 12027
Infinite Energy Center, Duluth

⌘ **Don Farmer's 2016 Federal Tax Update**
December 12, 2016 | CPE: 8 General
Event Code: 11045
UGA Tifton Campus Conference Center, Tifton

⌘ **Don Farmer's 2016 Federal Tax Update**
December 14, 2016 | CPE: 8 General
Cobb Galleria Centre, Atlanta
Event Code: 12054 | LS12054

⌘ **Don Farmer's Pre-Tax Season Review for Individual Returns**
December 15, 2016 | CPE: 8 General
Cobb Galleria Centre, Atlanta
Event Code: 12064 | LS12064

⌘ **Don Farmer's Pre-Tax Season Review for Corporate Returns**
December 16, 2016 | CPE: 8 General
Cobb Galleria Centre, Atlanta
Event Code: 12065 | LS12065

To register: Visit www.gscpa.org or call 404-504-2985 or 800-330-8889, Opt. 3

REGISTRATION

Event Code: 13060, 13062, 13063

Name | MI | Last | Member #

Company/Firm Name

Address

City | State | Zip

Phone | Fax | Email

Registration Confirmation: ❑ Mail ***OR*** ❑ Email

Check here if registration includes a change of address: ❑

PRICING INFORMATION

Course Number	Member Early Fee	Member Standard Member Late Fee	Nonmember Early Fee	Nonmember Standard Nonmember Late Fee
❑ 13060 - Both Days	$365 by 11/9	$425 by 11/28 $465 after 11/28	$465 by 11/9	$525 by 11/28 $565 after 11/28
❑ 13062 - Wednesday Only	$255 by 11/9	$315 by 11/28 $355 after 11/28	$355 by 11/9	$415 by 11/28 $455 after 11/28
❑ 13063 - Thursday Only	$255 by 11/9	$315 by 11/28 $355 after 11/28	$355 by 11/9	$415 by 11/28 $455 after 11/28

Cancellation Policy: Cancellations/Transfers made up to three weeks before the seminar or conference will not incur an administration fee. Cancellations/Transfers made during the Standard Fee time frame are subject to a $50 administration fee. Cancellations/Transfers made within three business days are subject to a $100 administration fee for members; $150 for nonmembers. *Cancellations/No shows on the date of the event forfeit the entire registration fee. No refunds or transfers of course fee will be made after the date of the event.*

REGISTER TODAY!

CALL GSCPA CPE Department at 404-504-2985 or 800-330-8889, Opt. 3 to place a credit card order

FAX a completed registration form with credit card information to GSCPA at 404-237-1291

INTERNET registration available at www.gscpa.org

MAIL your completed registration with credit card information or check made payable to The Georgia Society of CPAs to: The Georgia Society of CPAs
Six Concourse Parkway, Suite 800
Atlanta, GA 30328

Turn Form Over for Breakout Session Selections & Payment Information

BREAKOUT SESSIONS

Choose one session per time slot

WEDNESDAY, NOVEMBER 30

12:45 - 2 p.m.

- ❑ D1 - International Tax Reporting Issues: Find Out What You Need to Know
- ❑ D2 - Social Security 101

2:20 - 3:10 p.m.

- ❑ E1 - Income Tax Planning: The Fulcrum for Effective Retirement
- ❑ E2 - War Stories from the M&A Trenches: Real World Mistakes That Were Deal Killers

3:20 - 4:35 p.m.

- ❑ F1 - The New DOL/FLSA Overtime Regulations and Other Related Issues
- ❑ F2 - WTF!: When Tax Season Fires Up! Let's Get Ready to Rumble

THURSDAY, DECEMBER 1

1:20 - 2:35 p.m.

- ❑ L1 - State and Local Tax Incentives for Business
- ❑ L2 - Leases: Tenant Improvements and Depreciation (A&A)

2:50 - 4:05 p.m.

- ❑ M1 - Preventing and Detecting Fraud including Cyberfraud (A&A)
- ❑ M2 - Research and Development Tax Credit

MATERIALS

Choose how you wish to receive conference materials

- ❑ Download eMaterials — **No printed materials provided at the conference**
- ❑ Printed Materials — **Will receive printed materials at the conference**

PAYMENT INFORMATION

- ❑ Use Money on Account
- ❑ Check for $____________ made payable to The Georgia Society of CPAs
- ❑ Amount to charge credit card $____________ ❑ Personal Card *OR* ❑ Company Card
- ❑ Discover ❑ MasterCard ❑ AmEx ❑ Visa

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Card Number Expiration Date

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Name as it appears on card

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Signature

TASK FORCE MEMBERS

CO-CHAIRS:

William C. Harshman II, CPA, Harshman & Company, LLC, Atlanta, Ga.

David A. Hendelberg, CPA, J.D., PFS, CFP®, Jones and Kolb, CPAs, Atlanta, Ga.

MEMBERS:

Karen C. Drescher, CPA, Karen C. Drescher, CPA, PC, McDonough, Ga.

W. Chase Idol, CPA, Idol & Associates, LLC. Barnesville, Ga.

Rick W. Rosell, CPA, Bennett Thrasher PC, Atlanta, Ga.

FACILITY

Coastal Georgia Center

305 Fahm St

Savannah, GA 31401

912-651-2005

HOTELS

Courtyard Marriott Savannah Historic

415 W Liberty Street, Savannah, GA 31401

912-790-8287

Deadline: October 29 | Rate: $125 | $10/day Valet Parking

Residence Inn Savannah Historic Distrcit

500 West Charlton Street, Savannah, GA 31401

912-233-9996

ITEMS TO NOTE

If you have a specific dietary or other need, please contact the CPE Department at least one week prior to the conference at 404-504-2985 or 800-330-8889, Opt. 3.

If you have special needs under the Americans with Disabilities Act, please attach a written description or call 404-504-2985 or 800-330-8889, Opt. 3.

The Georgia Society
of CPAs

Six Concourse Parkway
Suite 800
Atlanta, GA 30328

GEORGIA TAX FORUM
SAVANNAH

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