



# The Accountant

Official Publication

of the North Carolina Society of Accountants

Post Office Box 1126, Conover, NC 28613

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July 2018



## A Message From The President

*Jense H. Creighton*



**Jense H. Creighton**

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attached



### *President Creighton's Acceptance Speech at the 71<sup>st</sup> 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 1<sup>st</sup> 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](mailto: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](mailto: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 1<sup>st</sup> Monday after the 15<sup>th</sup> of each month. For more information contact Marsha Wheeler at [mwheeler14@nc.rr.com](mailto: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 4<sup>th</sup> Monday of each month. For more information contact Kevin Robinson at [kevrob@triad.rr.com](mailto:kevrob@triad.rr.com)

### Charlotte

The Charlotte Chapter will meet on Thursday, July 26, 2018 at ... The Charlotte Chapter meets the 4<sup>th</sup> Thursday each month. For more information contact Trina Stahl at [trina@jensehaynes.com](mailto:trina@jensehaynes.com)

### Eastern

The Eastern Chapter will meet on Tuesday, July 24, 2018 at 6:00pm... The Eastern Chapter meets the 4<sup>th</sup> Tuesday each month. For more information contact Karen Spruill at [kspruill@downsouthtax.com](mailto: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](mailto: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](mailto:dlhacct@triad.rr.com)

### Raleigh

The Raleigh Chapter will meet on Tuesday, July 24, 2018. The Raleigh Chapter normally meets on the 4<sup>th</sup> Tuesday of each month. For more information contact Stephen Metelits at [metelits@usa.net](mailto: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](mailto:angelicape@aol.com)

### Western

The Western Chapter will meet on Tuesday, July 24, 2018... The Western Chapter meets the 4<sup>th</sup> Tuesday of each month. For more information contact Beth Evans at [beth.evans@precisionacct.com](mailto:beth.evans@precisionacct.com)

### Wilmington

The Wilmington Chapter will meet July ? 2018. For more information contact Susan Corliss-Bland at [su-san@intrstar.net](mailto:susan@intrstar.net)

**TELL THE ACCOUNTANT WHAT IS HAPPENING IN YOUR CHAPTER. E-MAIL NEWS  
TO: [jawmcneill@gmail.com](mailto: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 **U.S. Individual Income Tax Return 2018** 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 package 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 all the income I reported on this return. I am (the preparer) a preparer who has any knowledge of the preparer's tax status. I am not a preparer who has any knowledge of the preparer's tax status.

Joint return?  See instructions. Keep a copy for your records.  Spouse's signature, return, and instructions.  Preparer's signature, occupation, and firm's name.

**Paid Preparers** 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 1<sup>st</sup>, 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](mailto: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 71<sup>st</sup> Annual Convention at Pine Needles.



## Bob Brooks Plans His Retirement

In a review of the May 24<sup>th</sup> 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

### **PRESIDENT – JENSE H. CREIGHTON**

2120 Crown Center Drive Unit 300  
Charlotte, NC 28227  
704-845-5440  
*jense@jensehaynes.com*

### **PRESIDENT-ELECT – JOHN MCKINNEY**

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Marion, NC 28752  
828-652-8444  
*johnm@accuraaccounting.com*

### **SECRETARY – KEVIN ROBINSON**

8420 Endicott Road  
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336-996-740  
*kevrob@triad.rr.com*

### **TREASURER – JULIE MCNEILL**

508 North Broad Street  
Seagrove, NC 27341  
336-873-7690  
*jawmcneill@gmail.com*

### **IMMEDIATE PAST PRESIDENT – JAMES P. UPTON, III**

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336-873-7690  
*jamesupton@rtmc.net*

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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](http://www.ptitax.com)



Professional Tax Institutes, Inc

# 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 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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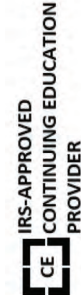
**The Tax Cuts**  
and  
**Jobs Act**

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](http://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 101.6(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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VOLUME 40 NUMBER 1

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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

Fees - \$400.00 received by Nov. 14  
\$440.00 received after Nov. 14

### 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](http://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: \_\_\_\_\_

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

Preferred method of payment: \_\_\_\_\_  
 Check enclosed to cover the full fee  
**Make checks payable to: PTI, Inc.**

Mail to: Professional Tax Institutes, Inc.  
P.O. Box 77  
Clay Center, KS 67432

CVV - REQUIRED:

Charge to:  VISA  Mastercard  American Express  Discover

Account Number  exp

Cardholder (print): \_\_\_\_\_

Authorized Signature: \_\_\_\_\_

## 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**

