

**2015 University of Connecticut Income Tax School**  
**November 16 & 17, 2015**  
**Crowne Plaza, Cromwell, CT**

The University of Connecticut Income Tax School is a two-day program on federal and state taxes. It is designed to bring you up to date with the latest tax law information as you prepare for the upcoming tax preparation season. The program is specifically designed for accountants, consultants, attorneys, enrolled agents and all other tax professionals who prepare taxes.

Each registrant receives both the volumes of the 2015 *Federal Tax Workbook*. The volumes include chapters on due diligence and other ethical issues, education tax provisions, capitalization vs. repair update, small business issues, individual taxpayer issues, depreciation, foreign asset disclosure, trust accounting and taxation, and rulings and cases.

The 2015 Income Tax School will have an outstanding group of instructors from the Internal Revenue Service, the Connecticut Department of Revenue Services, and private legal and accounting practices. Each instructor has expertise in important federal or state taxation issues as well as teaching experience.

Enrolled Agents attending this year's program will receive four credits of "federal tax law update" topics, seven credits of "federal tax law related" topics, AND two credits of "ethics" topics. UConn's IRS CE provider number and relevant program numbers will be made available to the participants during the tax school in November.

UConn tax school participants seeking credits to fulfill any continuing education requirements applicable to all the other categories of tax professionals (for example, CPAs) will be awarded 16 hours of Continuing Professional Education credits and will receive a University of Connecticut certificate of completion.

**Cost and Registration**

The registration fee is \$350 with an early registration fee of \$335 for those whose registration is postmarked on or before October 16. Early registration is advised as registration is on a first-come, first served basis. Online registration is also available this year, please visit [www.are.uconn.edu](http://www.are.uconn.edu) for more details on how to register online. The fee includes continental breakfast, lunch, break refreshments, the 2015 *Federal Tax Workbook*, and other course materials for both days.

Registration fees will be refunded if they are received after the enrollment limit has been reached. Your registration fee will be returned in full if a written cancellation request is received by October 31; from November 1 - November 7 a cancellation fee of \$95.00 will be charged. No refunds will be given after November 7 for cancellations.

**School Location**

The school will held be at the Crowne Plaza, 100 Berlin Road, Cromwell, CT with easy access off I-91 - Exit 21 off I-91.

**Hotel Lodging**

Special discount rates are available to school registrants for overnight lodging at the Crowne Plaza, Cromwell. Room rates are \$109.00 plus tax for single or double occupancy. To obtain the discount room rate, mention that you are attending the "University of Connecticut Income Tax School" and ask for the discount rate when you make the reservation. Reservations must be made by Nov. 1, 2015 to receive the discount rate.

Phone 860-635-2000 for reservations.

**Early Registration is suggested**

Since enrollment is limited, registration cannot be accepted after the limit is reached and will be returned with a full refund. For more information, contact tax school coordinator Joseph Bonelli/Claire Bazzano, University of Connecticut at 860-486-1920 (phone), 860-486-1932 (fax) or [claire.bazzano@uconn.edu](mailto:claire.bazzano@uconn.edu) (e-mail).

## Monday, November 16, 2015

**8:00 - 8:30 Registration and Continental Breakfast**

**8:30 - 8:35**

Welcome and Introductory Remarks  
**Joseph Bonelli, Tax School Coordinator**  
University of Connecticut

**8:35 - 10:05**

What's New in Federal Income Taxes?  
**Eric L. Green, Attorney**  
Green & Sklarz, LLC

**10:05 - 10:20 Break**

**10:20 – Noon**

Ethics and Risk Management for Tax Preparers:  
Circular 203 and Beyond  
**Jeff Sklarz, Attorney**  
Green & Sklarz, LLC

**Noon - 12:45 Lunch at Hotel**

**12:45 - 1:55**

IRS Key Messages  
**Joseph McCarthy, CPA**  
Senior Stakeholder Liaison  
Internal Revenue Service

**1:55 - 3:05**

Identity Theft, Refund Fraud & Tax Practitioner  
Data Breaches  
**Christine Puglisi**  
Special Agent IRS Criminal Investigation  
Internal Revenue Service

**3:05 - 3:20 Break**

**3:20 - 4:30**

IRS Taxpayer Advocate Update  
**Alisa Lebovitz**  
IRS Local Taxpayer Advocate  
Internal Revenue Service

**4:30 p.m. End of First Day's Program**

## Tuesday, November 17, 2015

**8:00 - 8:30 Sign-in and Continental Breakfast**

**8:30 - 10:05**

Dept. of Revenue Services Update  
**Louis Bucari, General Counsel**  
CT Department of Revenue Services

Corporation Tax Update

**Matthew Dayton, Attorney**  
CT Department of Revenue Services

**10:05 - 10:20 Break**

**10:20 - 11:00**

Sales Tax & Income Tax Update  
**Marilee Clark, Attorney**  
CT Department of Revenue Services

**11:00 - Noon**

Employee Benefits Update  
**Sharon Freilich, Attorney**  
Pullman & Comley LLC

**Noon-12:45 Lunch at Hotel**

**12:45- 1:55**

Current Hot Issues in Structuring Section 1031  
Like Kind Exchanges of Real Estate  
**Lou Schatz, Attorney**  
**David Bigger, Attorney**  
Shipman & Goodwin LLC

**1:55 - 3:05**

Identity Theft in Different Forms  
**Raymond J. LaLuna, EA**  
LaLuna Tax Service

**3:10 - 3:25 Break**

**3:25 - 4:30**

US Taxation of American Citizens and  
Residents Living and Working Abroad  
**Julius Janusz, EA**  
J & J Financial Associates LLC

**4:30 p.m. End of Program**

## 2015 UConn Income Tax School Registration Form

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**Last Name**

**First**

**M.I**

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**Organization/Firm**

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**Address**

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**City**

**State**

**Zip**

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**PTIN# (only for EAs, RTRPs, RTRP candidates)**

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**Daytime Phone**

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**E-mail address**

Number of people attending \_\_\_\_\_

Registration Fee: \$350.00 per person (**one form per registrant**)

Includes lunches, break refreshments, continental breakfast and tax manual

Early Registration Fee, if postmarked by

**October 16, 2015: \$335.00**

Early Registration is advised. Registrations cannot be accepted after school capacity is reached.

Please make check payable to: **University of Connecticut** and mail with registration form to:

Claire Bazzano

University of Connecticut

Agricultural and Resource Economics

1376 Storrs Road, Unit 4021

Storrs, CT 06269-4021