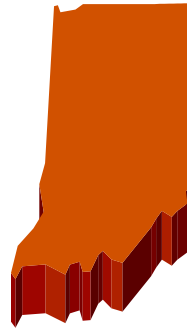


Indiana



AUGUST 2009

FALL CONFERENCE Monday and Tuesday, October 19th and 20th

The joint meeting of the Indiana Chapter of the National Association of Tax Professionals and the Indiana Society of Enrolled Agents will be at Marriott East, 7202 E. 21st Street, Indianapolis on October 19th and 20th. Room reservations can be made at 317.322.3716 with a discount rate of \$104 if made by September 18, 2009. Online reservations for the Marriott can be made at www.marriott.com/inddt. Use the discount code NATNATA to get the reduced rate by September 18th.

Other accommodations are at La Quinta Inn, 7304 E 21st St., Indianapolis, across the street from the Marriott. Their room rate is \$84. Reservations can be made at 866.527.1498.

Conference reservations can be made by completing the reservation form on the following page of this newsletter and sent to Duane Blaschke! We believe this conference will provide answers to your questions about tax changes this year!

MONDAY: October 19, 2009

CPE: 8 + 2 Ethics

7:30	REGISTRATION	
8:00	Business Meeting/Election of Board	
8:20	Social Security & Retirement Planning What Every Tax Professional Should Know	Charo Boyd, SSA Public Affairs
9:40	BREAK	
10:00	Net Operating Losses	Mary Mellem, EA
12:00	LUNCH	
1:00	Farm & Hobby Farm Issues	Mary Mellem, EA
2:30	BREAK	
2:50	Schedule D Workshop	Mary Mellem, EA
4:40	DISMISSAL	
6:00	Ethics	Mary Mellem, EA
7:45	DISMISSAL	

Net Operating Losses

Computation of the NOL, using the NOL; carryback, forgoing the carryback, calculating the NOL remaining to be used in another year, and AMT-NOL.

This program includes taking a taxpayer's current year return, calculating the loss, carrying it back, and calculating it forward. Copies of the applicable tax returns are used in this activity.

Farm and Hobby Farm Issues

Tax Issues discussed based on Market Segment Specialization Program (MSSP) information.

Schedule D Workshop

- Stock and Bonds and Options
- Mutual Funds
- Wash Sales
- Demutualization
- Equity Options (puts and calls)

Conference Schedule and Topics

TUESDAY: October 20, 2009

CPE: 8 hours

7:30	REGISTRATION	
8:00	Installation of Officers	
8:20	Internal Revenue Service Updates	Charles Barrington
9:40	BREAK	
10:00	Internal Revenue Service Updates (cont'd)	Charles Barrington
10:30	Indiana Legislative Updates	TBA
12:00	LUNCH	
1:00	Credits – Overview of Personal & Business	Mary Mellem, EA
2:50	Ask Mary – Submit Questions w/registration	Mary Mellem, EA
4:40	DISMISSAL	

Internal Revenue Service Update

Discussion and review of American Recovery and Reinvestment Act of 2009 and other tax law changes this year.

Indiana Dept. of Revenue Update

Legislative changes and online options for tax professionals. New legislation on filing requirements for this year! And a new look for form IT-40.

Social Security & Retirement Planning

How Social Security benefits are figured and paid. Review of various on-line services.

Ethics

Review of Circular 230 changes and discussion of disclosure rules.

Tax Credits

Overview of personal and business credits including, but not limited to:

- Education
- Dependent Care
- Adoption
- Small Business

Ask Mary

Attendees submit their questions ahead of time and Mary addresses them at the conference. Additional questions are allowed from the floor as time permits. Questions should be valuable to the audience in general and be of a nature to be discussed in 10-15 minutes.

Welcome New IN NATP Members!

Julianne Richardson, Ft. Wayne * Horst Rahden, Ft Wayne * Kent H. Burrow, Indianapolis*



Indiana NATP Board

We are electing four directors this year. If you would like to be a part of the Indiana NATP board, send your nominations to any board member. We have positions in Region 3, Region 5, and two At Large positions for election. Please consider adding your expertise and enthusiasm to our group!

*Indiana Chapter of the National Association of Tax Professionals
AND Indiana Society of Enrolled Agents*

ANNUAL CONFERENCE REGISTRATION

Dates: October 19-20, 2009
Location: Marriott East 7202 East 21st Street, Indianapolis, IN 46219
Phone: (317) 322-3716
Group Rate: \$104.00; reserve by 09-18-09
Discount Code: for online reservations: NATNATA

Cost:	<i>Early Registration:</i>	Members:	\$ 200 / 2 days	Non-members:	\$225 / 2 days
	by 09-30-09		\$ 140 / 1 day		\$165 / 1 day
	<i>Late Registration:</i>	Members:	\$ 225 / 2 days	Non-members:	\$250 / 2 days
	after 09-30-09		\$ 145 / 1 day		\$170 / 1 day

Walk-in Registration: Additional \$10 per day

Discounts: *Option 1:* 10% off first-time attendee
Option 2: 10% off additional attendees from your office with one full-price registration
USE WHICHEVER DISCOUNT IS BETTER, BUT NOT BOTH.

Benefits: 18 Hours of CPE available; *first day includes 2 hours of ethics.*
Continental breakfast, hot lunch, and dessert provided
Door prizes, vendors, and networking opportunities

NAME _____
ADDRESS _____
CITY, ST, ZIP _____
PHONE (____) _____
EMAIL: _____

NATP MEMBER	YES _____	NO _____
ISEA MEMBER	YES _____	NO _____
Days Attending	1 st ___ 2 nd ___	Both _____
1 st Time Attendee	YES _____	NO _____

Will you have special accommodation or dietary requirements during the conference? Yes _____ No _____

Describe: _____

Payment must accompany registration

Payment Amount: \$ _____

SEND REGISTRATION TO: Duane Blaschke
1249 E Morgan St., Martinsville, IN 46151
blaschke1932@yahoo.com

• Check payable to: **IN Chapter of NATP**

• Credit Card: Type of Card _____

Card No: ____/____/____/____ Exp. Date: ____

Name on Card: _____

Authorized Signature: _____

ASK MARY! Submit your tax questions for Mary Mellem here or on a separate page. _____

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