

Don't miss the **13<sup>th</sup> Annual San Diego Tax & Accounting Institute**, the region's premier opportunity for tax professionals to hear the recent developments in federal, state and local tax and accounting issues. Stay current with timely updates on tax legislation and their impact to firms and clients. Choose from several breakout sessions focused on two tracks—tax and accounting—plus general sessions and keynote speakers.

**Wednesday, Nov. 18**

- Session 1** 8–10:15 a.m. Keynote (*Marney Cox*)
- Session 2** 10:30–11:45 a.m. Case Study of Short Sales & Foreclosures & Debt Restructuring (*Peter J. Elias*)
- Session 3** 1–2:30 p.m. FTB Update (*Steve A. Sims*)
- Session 4** 2:45–3:45 p.m. Series LLC Tax Consequences (*Phillip L. Jelsma*)
- Session 5** 3:45–4:45 p.m. What Can We Learn from “The Match King”? (*Frank Partnoy*)

**Thursday, Nov. 19**

- Session 6 Tax** 8–10:15 a.m. International Update of FBAS & 5472 Preparation & Foreign Partner Withholding (*Patrick W. Martin & Jon P. Schimmer*)
- Session 7 Tax** 10:30 a.m.–noon Estate Planning (*Michele A. Tutoli*)
- Session 8 Tax** 1–2:30 p.m. Retirement Planning and New Bonds (*Joseph A. Forlenza*)
- Session 9 Tax** 2:45–4:45 p.m. Significant Developments Involving IRS Regulation of Tax Preparers Including Penalties and Non-Passive Losses (*Stuart R. Josephs*)
- Session 10 A&A** 8 a.m.–4:45 p.m. Compilation and Review: Current Issues (*Diane S. Conant*)

**Friday, Nov. 20**

- Session 11 Tax** 8–9:15 a.m. S Corporation Update (*Robert W. Blanchard*)
- Session 12 Tax** 9:30–10:30 a.m. Business Valuation for the Small Practitioner (*Brian P. Brining*)
- Session 13 Tax** 10:45–11:45 p.m. A Safe Harbor for Defrauded Investors (*John C. Zimmerman*)
- Session 14 A&A** 8–9:15 a.m. Fair Value Accounting (*James Comito*)
- Session 15 A&A** 9:30–10:30 a.m. IFR for Private Companies (*Stephen G. Austin*)
- Session 16 A&A** 10:45–11:45 a.m. Cooking the Books (*Dana A. Basney*)

**Please check those sessions you plan to attend.**

If you have food allergies or require a vegetarian option, contact Cindy Holcomb, program associate, at (858) 581-2541 at least three days prior to the event.

**Dates:** Nov. 18–20      **Cost:** \$345/members; \$445/nonmembers  
**Time:** 8 a.m.–5 p.m./Nov. 18–19; 8 a.m.–noon/Nov. 20      (register by Nov 2 to receive an early bird discount of \$50 off)  
**Location:** Handlery Hotel & Resort; 950 Hotel Circle North; San Diego      **CPE:** 20 hours  
**Level:** Beginner      **Prerequisites/Adv. Prep:** None

**CalCPA San Diego Chapter**

**Tax & Accounting Institute**

REGISTER FOR THIS CHAPTER EVENT ONLINE AT [www.calcpa.org](http://www.calcpa.org)

For Accounting Purposes: 4410-1XX-11101

For options other than online, please call Cindy Holcomb, program associate at (858) 581-2541 or fax the completed form to her with payment at (858) 581-2082.

Member ID No. \_\_\_\_\_ CPA License No. \_\_\_\_\_  Nonmember  
(required for member discount)

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