



**REGISTRATION
2008 NATIONAL
TAX CONFERENCE**

**SESSION A—Wednesday, November 5, 2008 (\$55)
SESSION B—Wednesday, November 12, 2008 (\$55)
8:15 A.M.—12:25 P.M.**

Please type or print

Name(s): _____

Name of Organization: _____

Address: _____

_____ Zip: _____

I/we will attend Session A ____ at \$55 _____

I/we will attend Session B ____ at \$55 _____

Total Enclosed _____

Method of Payment

___check enclosed payable to The University of Akron

___charge to credit card ___Visa ___MC ___Discover

Card Number _____ Exp. Date _____

Occupation: CPA Faculty
 Attorney Student
 PA
 Other: _____

Enclose your registration (checks payable to The University of Akron), detach, and return by the specified date to:

Alvin Lieberman
George W. Daverio School of Accountancy
The University of Akron
Akron, OH 44325-4802
(330) 972-6229 (phone)
(330) 972-8597 (fax)

MASTER OF TAXATION PROGRAM

The Master of Taxation Program at The University of Akron, the only one in Ohio at an AACSB accredited School of Accountancy, was introduced in January 1980. It is a professional degree program designed to provide timely training in the field of taxation. The program's course of study is appropriate for students planning to enter the field, as well as for experienced accountants or attorneys. Through an integrated curriculum emphasizing tax research, planning, and communication skills, students are taught to identify and solve taxation problems and cases in both federal and state taxation.

The School of Law and the School of Accountancy offer a joint degree program in legal and taxation studies. (J.D. and MTax). The amount of time required to complete the program is less than for the completion of both programs separately.

Graduate taxation courses are offered evenings by the School of Accountancy to serve students who are employed full time or doing a joint degree. Each class meets one night a week during the regular semester and twice each week during summer sessions.

For more information regarding the requirements for admission to the Master of Taxation and Joint Degree programs, please write or phone: Dr. Thomas G. Calderon, Chair, School of Accountancy, College of Business Administration, The University of Akron, Akron, Ohio 44325-4901, (330) 972-6228. Please apply online by June 1, 2009 at <http://www.akron.edu/gradsch>.

For more information regarding the requirements for admission to the School of Law and Joint Degree program, please write or phone: Ms. Lauri S. Thorpe, Assistant Dean of Admission and Financial Aid, School of Law, The University of Akron, Akron, Ohio 44325-2901, (330) 972-7331.

MASTER OF TAXATION DEGREE PROGRAM

Required Tax Courses

Courses Credits

Part-time 21 Month Program

Fall 2009

6200:641 Taxation of Partnerships 3
6200:648 Tax Practice and Procedure 3

Spring 2010

6200:632 Tax. of Transactions in Property 3
6200:651 International Taxation 3

Summer 2010

Electives (two classes)* 6

Fall 2010

6200:628 Basic Tax Research 3
6200:631 Corporate Taxation I 3

Spring 2011

6200:643 Tax Accounting 3
6200:649 State and Local Taxation 3

30

Full-time Two Semester Program

Fall 2009

6200:628 Basic Tax Research 3
6200:631 Corporate Taxation I 3
6200:641 Taxation of Partnerships 3
6200:648 Tax Practice and Procedure 3
Elective* 3

Spring 2010

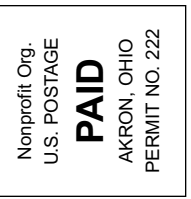
6200:632 Tax. of Transactions in Property 3
6200:651 International Taxation 3
6200:643 Tax Accounting 3
6200:649 State and Local Taxation 3
Elective* 3

30

Total credits required for the MTax

Approved taxation electives include such courses as:

6200:642 Corporate Taxation II 3
6200:645 Advanced Individual Taxation 3
6200:662 S. Corporations 3
6200:646 Consolidated Tax Returns 3
6200:647 Qual. Pensions & Profit Sharing 3
6200:693 Sel. Topics-Mergers & Acq. 3



The University of Akron
George W. Daverio School of Accountancy
Akron, OH 44325-4802



**Announcing—
2008 National Tax Conference**

Session A—Wednesday, Nov. 5, 2008
(8:15 A.M.—12:25 P.M.)
4.8 Hours CPE, 4.0 Hours CLE

Session B—Wednesday, Nov. 12, 2008
(8:15 A.M.—12:25 P.M.)
4.8 Hours CPE, 4.0 Hours CLE

University of Akron is an Equal Opportunity Employer

**2008
National
Tax
Conference**

**Session A—Wednesday,
November 5, 2008*
8:15 A.M.—12:25 P.M.
CPE Credit: 4.8 hrs.
CLE Credit: 4.0 hrs.
0 hours ethics, substance
abuse, professionalism**

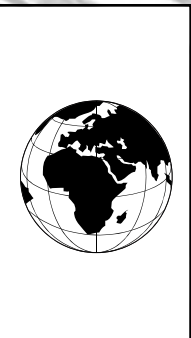
**Session B—Wednesday,
November 12, 2008*
8:15 A.M.—12:25 P.M.
CPE Credit: 4.8 hrs.
CLE Credit: 4.0 hrs.
0 hours ethics, substance
abuse, professionalism**

***Each session covers a
different set of topics.**

**Registration Fee:
\$55 Each Session.**

**NEW LOCATION:
Quaker Square Inn
At The University of Akron
135 South Broadway St.
Akron, OH 44325-9002
(330) 253-5970**

**Sponsored by:
THE GEORGE W. DAVERIO
SCHOOL OF ACCOUNTANCY
THE UNIVERSITY OF AKRON
(330) 972-7586 (phone)
(330) 972-8597 (fax)**





PURPOSE OF CONFERENCE

The 2008 National Tax Conference (30th annual), sponsored by The George W. Daverio School of Accountancy at The University of Akron, is designed to update tax practitioners in the accounting, legal, business, and governmental sectors. New developments, tax-saving ideas, current issues, and changes in the laws applying to business and individual taxes will be discussed by prominent tax specialists.

CPE and CLE CREDIT

Each session of the National Tax Conference qualifies for 4.8 hours of Continuing Professional Education (CPE) credit (approved by the Accountancy Board of Ohio). This course has been approved by the Ohio Supreme Court Commission on Continuing Legal Education for 4.0 CLE credit hours, including 0.00 hours in ethics, 0.00 hours in substance abuse, and 0.00 hours in professionalism instruction. Forms will be available at the Conference to validate attendance.

FEE REGISTRATION

The University of Akron presents this program as a public service to the tax community. The registration fee is \$55 per session to defray costs, which include participation in the Conference, course materials, in-depth outlines, and refreshments.

Participants may attend both or either session of the Conference. Each session is independent of the other and covers a different set of topics.

To register, please complete the attached registration form, enclose your check or money order made payable to The University of Akron, and mail to Alvin Lieberman, School of Accountancy, Akron, Ohio 44325-4802 by October 29, 2008, for Session A and by November 5, 2008, for Session B. You may register by credit card (Discover, Visa, MasterCard).

PARKING

Parking is free at the Quaker Square Inn at The University of Akron.

WHO SHOULD ATTEND THIS CONFERENCE?

Accountants, attorneys, business people, financial planners, and others who desire to learn about recent developments in the various tax areas will gain much from this conference.

PROGRAM

SESSION A: Wednesday, November 5, 2008

7:45 A.M.–8:15 A.M.

COMPLIMENTARY DANISH AND BEVERAGES

8:15 A.M.–12:25 P.M.

2008 FEDERAL TAX UPDATE – YEAR IN REVIEW

Charles F. Mullen, CPA, CMA
Apple Growth Partners, Akron, OH

SELECTED ISSUES IN PRIVATE EQUITY ACQUISITIONS

Robert W. Malone, JD
Buckingham, Doolittle & Burroughs, LLP, Akron, OH

COFFEE BREAK

CORPORATE SUCCESSION PLANNING: THE FAMILY BUSINESS IN TRANSITION

James G. Dickinson, JD
Cavitch, Familo, Durkin & Frutkin Co., LPA
Cleveland, OH

INTERNAL REVENUE CODE SECTION 199 UPDATE

Laura J. Hardy, CPA
Deloitte Tax LLP, Cleveland, OH

SESSION B: Wednesday, November 12, 2008

7:45 A.M.–8:15 A.M.

COMPLIMENTARY DANISH AND BEVERAGES

8:15 A.M.–12:25 P.M.

INCOME TAX ADVANTAGES AND DISADVANTAGES OF PARTNERSHIPS AND LLCs

Angelina L. Milo, CPA
Cohen & Company, Akron, OH

DEVELOPING AN ATTRACTIVE PROFESSIONAL PRACTICE

Gale Crosley, CPA
Crosley & Company, Atlanta, GA

COFFEE BREAK

BASIC INTERNATIONAL PLANNING TO MIDDLE MARKET CLIENTS

Erik Rosenfeld, CPA
Christopher Gaugler, CPA
PricewaterhouseCoopers, LLP, Cleveland, OH

WHAT'S AHEAD? LEGISLATIVE OUTLOOK AND IFRS TAX ACCOUNTING

Curtis B. Mall, CPA
Ernst & Young, LLP, Cleveland, OH

PARTICIPANTS

Charles F. Mullen, is a principal of Apple Growth Partners, joining the firm through a merger with Brott Mardis & Co., an Akron-based CPA firm. He provides tax and accounting services to closely held companies and individuals, manages audit and review services, and assists with financial planning services. A frequent public speaker, Chuck has presented at both firm events and other organizations' meetings. He also provides business evaluation, management consulting and tax planning services to corporations, partnerships, and individuals.

Chuck was chosen as a recipient of the Greater Akron Chamber's "30 For the Future Award," an award which honors young professional (ages 25-39) for contributions which impact their industries in the Greater Akron region.

Mr. Mullen received his undergraduate degree in accounting (1995) and his Master of Taxation (2000) from The University of Akron. He has been a licensed Certified Public Accountant since 1998 and a Certified Management Accountant since 2000. He is a Governance Board Member of The University of Akron Master of Tax Program.

Robert W. Malone is a shareholder and Chair of the Business Practice Group of Buckingham, Doolittle & Burroughs, LLP. His professional practice includes the areas of business law, mergers and acquisitions, taxation and employee benefits, and trusts and estates. Rob is the former chair of the firm's Mergers and Acquisitions Practice Group and a member of the Board of Directors from 1987-2001. He served on the committees which drafted the Ohio statutes establishing a "brightline" test for residency and authorizing Limited Liability Companies. Mr. Malone continues to serve on the committee that monitors and proposes amendments for the Limited Liability Company legislation.

Rob has been recognized as one of "Ohio's Super Lawyers" from 2004 through 2008 as voted by his peers. In addition, he has received special recognition for being listed as one of The Best Lawyers in America for more than twenty consecutive years (1987-2008). He has written many articles which have been published in various professional journals. Mr. Malone has taught and spoken on a number of subjects, including mergers and acquisitions and federal and state taxation issues, at various professional institutes, organizations and universities.

Rob received his B.A. *magna cum laude* from Mount Union College and his J.D. *summa cum laude* from The Ohio State University, College of Law. He teaches courses on Mergers and Acquisitions at The University of Akron College of Law and Master of Taxation Program. Mr. Malone is a trustee of the Greater Akron Chamber of Commerce and Hiram College.

James G. Dickinson is a member of the Cleveland law firm of Cavitch, Familo, Durkin & Frutkin Co., L.P.A. where his practice emphasizes estate planning, corporate succession planning, individual tax planning, and charitable organizations. Mr. Dickinson is licensed to practice law in Ohio and Florida. Jim was selected 2007 Distinguished Estate Planner by the Estate Planning Council of Cleveland and is certified by the Ohio State Bar Association as a

Specialist in Estate Planning and Trust & Probate Law. Mr. Dickinson has been named in *The Best Lawyers in America* for over 10 years and has been listed as an *Ohio Super Lawyer* in 2005, 2006, 2007 and 2008.

Jim was Chairman of the Estate Planning, Probate and Trust Law Section of the Cleveland Bar Association. He is a Fellow of The American College of Trust and Estate Counsel and serves on the Great Lakes Region IRS Advisory Board for Tax-Exempt and Governmental Entities.

Mr. Dickinson graduated from The University of Virginia School of Law and the Commerce School of Washington & Lee University, Phi Beta Kappa, Summa Cum Laude. Jim frequently lectures before business, professional and trade associations on estate planning, charitable gifting, private and public foundations and other tax-exempt corporate issues. He regularly advises health care and other foundations concerning the creation and maintenance of tax-exempt status.

Laura J. Hardy is a Senior Manager in Lead Tax Service line with the Cleveland Office of Deloitte Tax LLP. Laura is currently working with the National Production Activities Solutions group implementing the Section 199 Domestic Production Activities Deduction. She has participated in numerous Section 199 studies involving public and private multi-national manufacturing companies.

Laura joined the Deloitte Indianapolis office in June 2000 and transferred to the Cleveland office in May 2004. Prior to joining Deloitte, she worked in the tax department of the Toledo office of Ernst & Young. Her service areas focus on corporate taxation, consolidated groups, manufacturing industries, and the Domestic Production Activities Deduction.

Laura received her BBA from The University of Toledo. She is a member of the American Institute of CPAs and Ohio Society of CPAs and the Indiana Society of CPAs.

Angelina L. Milo is a Principal in the Tax Department of the Akron Office of Cohen & Company where she manages tax planning projects and general business consulting for individuals and closely-held businesses, including C Corporations, S Corporations, Partnerships and Limited Liability Companies. She is also experienced in assisting businesses through acquisitions and divestitures and has been a frequent speaker in recent years on a variety of tax issues.

Angelina is a member of the American Institute of CPAs, the Ohio Society of CPAs, and is active in the Akron Tax Club. She serves on the board of directors of the Women's Endowment Fund, The University of Akron College of Business Alumni Board, The University of Akron Master of Taxation Governance Board, and Women's Network Board. She is a member of the Akron Council of World Affairs, ArtCetera, and Greater Akron Chamber of Commerce KNOW.

Angelina earned her Bachelor's Degree in Accounting from The University of Akron, where she also minored in Italian, a language she speaks fluently.

Gale Crosley, CPA, was selected one of the 10 Most Recommended Consultants in the *Inside Public Accounting* "Best of the Best" for the fourth consecutive year, and one of the "Top 100 Most Influential People in Accounting" by *Accounting Today* for the second con-

secutive year. She is founder and principal of Crosley & Company and consults with CPA firms on revenue growth issues and opportunities.

Gale graduated from The University of Akron, Ohio, with a Bachelor of Science degree in Accounting, and is a CPA in Ohio and Georgia. Her background includes a unique mix of experience with two national CPA firms, and nearly thirty years in business development and senior management, including IBM and several small technology companies. Gale was formerly Executive Vice President of Business Development at a \$250 million consulting firm, and was responsible for implementing revenue growth initiatives among 39 individual practices, 1,500 CPAs and consultants, a direct sales force and marketing department, and 100 rainmakers. Over her career, she has been responsible for developing high performance rainmaking organizations, bringing more than 30 offerings to market and closing dozens of multi-million-dollar opportunities. Her first book, *At the Crossroads*, chronicles the challenges and successes of a fictional CPA firm struggling with growth.

Erik Rosenfeld is a director specializing in international tax issues with the PricewaterhouseCoopers Cleveland office. He has been with PricewaterhouseCoopers for five years and has over ten years of work experience on primarily corporate tax matters involving U.S. based multinational corporations. He recently returned to Cleveland after spending two years in PricewaterhouseCoopers' Washington National Tax Services office.

Erik specialized in international tax planning issues for U.S. and foreign multinational corporations and teaches regularly at PricewaterhouseCoopers' national training courses for tax specialists. Erik received his B.S. degree from Miami University in Oxford, Ohio (*summa cum laude*) and is a licensed CPA with the District of Columbia and Ohio Boards of Accountancy.

Christopher Gaugler is a Director in the Private Client Services (PCS) Tax Group of the Cleveland Office of PricewaterhouseCoopers. Chris is a CPA and has over eighteen years of experience. He specializes in tax consulting to privately owned businesses and their owners. Chris serves the manufacturing, retail, and distribution industries and has in-depth experience in assisting clients with accounting methods, capital recovery, flow-through entities, and family wealth planning.

Chris received his Bachelor of Science in Business Administration from John Carroll University and is a member of the American Institute of Certified Public Accountants and the Ohio Society of Certified Public Accountants.

Curtis B. Mall is Executive Director, Business Tax Services (North-east Ohio) of Ernst & Young. His professional career includes more than sixteen years in audit and tax advisory/compliance with a concentration in multinational SEC registrants in the manufacturing and distribution industries. He has extensive experience focusing on corporate tax issues and proactive tax planning with strength in FAS 109 income tax accounting and tax provision matters for clients with multiple locations around the world.

Curtis is a graduate of The University of North Carolina – Charlotte and is a member of the American Institute of Certified Public Accountants.