

**NORTH CAROLINA SOCIETY
OF ENROLLED AGENTS**

and

**SOUTH CAROLINA SOCIETY
OF ENROLLED AGENTS**

announce

**THE 5th ANNUAL CAROLINA CONNECTION
2010 CONVENTION and CPE SEMINAR**



Wilmington, North Carolina
The Port City

Two Separate Education Tracks are Offered:

Representation Issues

16 hours with Bob McKenzie, Esq.
or

Tax Issues for the Elderly

16 hours with NCPE Instructor Donald Williamson, CPA
(Level 2 exam for ARA certification available)

** Plus a 2-hour joint session kickoff ethics class **

Karen Hawkins, Director, IRS Office of Professional Responsibility
A Conversation about Practice and Ethics

We are also pleased to present special guest speaker
Mike Nelson, CAE, New Executive VP of NAEA

Total - 18 Hours of CPE

- When:** Wednesday, May 19 to Friday, May 21, 2010
Where: Hilton Wilmington Riverside, Wilmington, NC
located in historic downtown along the famous one mile Riverwalk
Why: Earn 18 hours of the best CPE,
buy great items at our famous auction,
and network with tax pros from East to West!

Included in registration are our auction/reception, 2 lunches and 2 continental breakfasts.

Registration and Payment Form enclosed
or access the form online at www.nc-sea.org or www.scsea.org

CAROLINA EAs Re-CONNECT

May 19-21, 2010

PROGRAM & SCHEDULE

Wednesday, May 19th, 2010

3:00pm - 4:00pm: Registration & Check-In

4:00pm – 5:40pm: Joint Kickoff Ethics Session (2 CPE hours)

Karen Hawkins, Director, IRS Office of Professional Responsibility

A Conversation about Practice and Ethics

Please use this evening to enjoy beautiful, historic Wilmington at your leisure.

Thursday, May 20th, 2010

7:00am – 8:00am: Registration and Continental Breakfast

8:00am – 11:40am: Dual Track Classes
with appropriate breaks

11:40am – 1:40pm: Lunch
with guest speaker Mike Nelson, CAE, EVP NAEA
NC and SC Annual Meetings

1:40pm – 5:20pm: Dual Track Classes
with appropriate breaks

6:00pm – 7:00pm: Reception
HOT HORS D'OEUVRES & CASH BAR
Visit with new and old friends and enjoy delicious food!

7:00pm until . . . Auction
A GREAT SOCIETY FUNDRAISER!
Lots of fun and lots of bargains!

Friday, May 21th, 2010

7:00am – 8:00am: Continental Breakfast

8:00am – 11:40am: Dual Track Classes
with appropriate breaks

11:40am – 12:40pm: Lunch

12:40pm – 4:20pm: Dual Track Classes
with appropriate breaks

The Tracks offered this year are either

Representation Issues

or

Tax Issues for the Elderly

Due to the nature of the Tax Track, we will be unable to offer the splitting of tracks.

More information on the Tax Issues for the Elderly and becoming an Accredited Retirement Advisor (ARA), formerly Elder Care Specialist (ECS), can be found at www.acatcredentials.org/credentials/ECS.htm.

Representation Issues

Robert McKenzie, Esq.

(16 CPE hours)

- 2010 Representation Update
- Advanced Examination Techniques and the Practitioner's Role in Protecting Taxpayer Rights
- Successfully Negotiating Offers in Compromise
- New IRS Criminal Initiatives
- Taxpayer Advocate Report
- New Procedures at IRS Campuses
- Backup Withholding

Robert E. McKenzie is a partner of the law firm of Arnstein & Lehr LLP of Chicago, Illinois, concentrating his practice in representation before the Internal Revenue Service and state tax agencies. He has lectured extensively on the subject of taxation and has presented courses before thousands of CPA's, attorneys and Enrolled Agents nationwide. Prior to entering private practice, Bob was employed by the Internal Revenue Service, Collection Division, in Chicago from 1972 to 1978. Since entering private practice, he has dedicated a major portion of his time to representation before the IRS.

Bob received his JD with High Honors from the Illinois Institute of Technology, Chicago Kent College of Law.

* Tax Issues for the Elderly

Donald Williamson, CPA

(16 CPE hours)

Day 1: Fiduciary (Form 1041) Workshop

- Decedent's Final Return
- Income Taxation of Estates and Trusts

Day 2: Federal Estate Workshop

- Basics of Estates, Trusts and Fiduciary Accounting
- Federal Gift Tax (Form 709)
- Federal Estate Tax Returns (Form 706)

Donald Williamson is an Associate Professor of Taxation and Director of the Graduate Tax Program at the Kogod College of Business Administration. In addition, he is a self-employed practitioner focusing on tax compliance and planning for small businesses and individuals.

Donald holds MBA, JD and LLM degrees.

*Participants of this track may take the Level 2 exam for the ARA accreditation through ACAT.

THE 5th ANNUAL CAROLINA CONNECTION 2010 CONVENTION *and* CPE SEMINAR

Classes begin Wednesday, May 19, 2010, at 4pm and end Friday, May 21, 2010, at 4:20pm.

Early Bird Special

Register for CPE by **March 31, 2010** to be entered in a drawing to **win** your 2010 Registration Fee.
Register at the Hilton by **March 31, 2010** to be entered in a drawing to **win** up to 2 standard night's accommodations.

Accommodations

Hilton Wilmington Riverside, 301 North Water Street, Wilmington, North Carolina, 28401-3934

Nightly Room Rate: \$129.00 (standard room) - This special rate applies for May 19 and May 20, 2010, and may also apply for May 15-18. This special rate is available until April 30th or until our block of rooms is filled.

Call: 1-910-763-5900 and **mention group code ENR or make your reservations online:**

www.hilton.com/en/hi/groups/personalized/ILMNCHF-ENR-20100518/index.jhtml

Education Registration Form

Your registration fee includes our auction/reception, 2 lunches and 2 continental breakfasts plus breaks.

Name: _____ Phone #(____) _____ Fax #(____) _____

Address, City, State, Zip: _____

Designation - EA, CPA, Esq., Other: _____ Email: _____

Education OPTIONS

You must choose between **Representation Track or Tax Track.**

(Due to the nature of the Tax Track, splitting of tracks cannot be offered this year.)

Due to Copyright limitations, no books for the Tax Track will be available unless registered for that Track.

Exclusive Offer for Attending NAEA Members: Enhance the skills of your employees.

Bring non-EA employees with you for just \$250.00 (\$300.00 after April 30, 2010).

<u>Participant</u>	<u>Register by April 30, 2010</u>	<u>Register after April 30, 2010</u>	<u>Your Cost</u>	<u>Track Choice</u> (circle one)
NAEA Member:	\$325.00	\$375.00	_____	REP TAX
Non-NAEA Member:	\$450.00	\$500.00	_____	REP TAX
Member's Non-EA Employee:	\$250.00 x _____ (# of employees)	\$300.00 x _____ (# of employees)	_____	REP TAX
Meals for Participant's Guests:	\$125.00 x _____ (# of guests)		_____	
Extra Books – Representation:	\$25.00 x _____ (# of books)		_____	
(Extra Elder Track material will not be available at seminar.)			<u>\$</u> _____	Total Cost

Name(s) of Employee(s)/Guest(s): _____

Refund Policy: For a full refund, cancellation must be received in writing by April 30, 2010.

PAYMENT

If paying by credit card: Fill in the information below.

If paying through the NCSEA PayPal account, please check here _____, remit payment via www.nc-sea.org,
and send in your registration form as instructed below.

Name (as it appears on the card): _____ Total Amount to Charge: \$ _____

VISA _____ MasterCard _____ Discover _____ Card #: _____

Card Security #: _____ Expiration: __/____/____ Signature _____

Please fax or mail your payment and all registration forms to:

North Carolina Society of Enrolled Agents
c/o Jack Schaub, EA
86 Misty Trace
Otto, NC 28763
Phone: (828)349-6000 Fax: (828)349-6009