

**Please Register by
November 13, 2009**

Mail registration form and payment to:

**IMA – MAC c/o Amy Snyder
11 Summerhill Drive
Downingtown PA 19335**

**Or e-mail form to Amy Snyder at
amysnyder11@hotmail.com
Scanned documents in PDF format preferred.**

Or fax registration form with cover to:

Amy Snyder at 610-834-0866

For the Following Policy Please Contact:

Cancellations and Complaint Resolution:

Joanne Newfield 609-315-4225

Information: Steve Rossi 610-724-3635

Refunds: Don Mullen 215-295-4727



MID-ATLANTIC COUNCIL
Invites You to Attend Our
Late Fall Conference

Friday, **November 20**, 2009

**Scanticon Hotel
1210 First Avenue
King of Prussia, PA 19406
610-265-1500**

**Day of Event Contact Cell Phone:
610.420.8296**

**Adjournment 3:45 PM
8 CPE Hours**

**IMA Mid-Atlantic Council is registered
With the National Association of State Boards of
Accountancy (NASBA) as a sponsor of continuing
professional education on the National Registry of CPE
Sponsors.**

**State boards of accountancy have the final authority on
the acceptance of individual courses for CPE credit.**

**Complaints regarding registered sponsors may be
addressed to the**

**National Registry of CPE Sponsors
150 Fourth Avenue North Suite 700
Nashville TN 37219-2417
Web site: www.nasba.org**



IMA Mid-Atlantic Council
1405 Larkspur Lane
Malvern PA 19355

IMPORTANT
DO NOT DISCARD OR RETURN!
If you do not plan to attend this live
group conference, please pass it
along to a colleague. Thank you!

Learning Objectives:

After completing this course you will be able to:

- Diversify concentrated exposure at low rates
- Know the benefits of converting Traditional IRA's to Roth and tax consequences
- Invest in a more tax aware environment
- Apply most important 2009 federal tax law changes to your tax return
- Advise clients on proper reporting of foreign bank accounts
- Identify latest IRS enforcement priorities & initiatives

IMA Mid-Atlantic Council
Late Fall PROFESSIONAL DEVELOPMENT CONFERENCE
Scanticon Hotel, 1210 First Ave., King of Prussia, PA 19406
Friday, November 20, 2009

Session	Time/Topic	CPE/FOS	Speaker/Affiliations
7:15 AM – 7:45 AM Registration & Continental Breakfast			
1	7:45 AM – 8:35 AM Taxes, a review of what is, what is likely to be and what might be	1 Tax	Anthony Curatola, PhD <i>Drexel University</i>
2	8:40 AM-9:30 AM Taxes, a review (continued)	1 Tax	Anthony Curatola, PhD <i>Drexel University</i>
9:30 AM – 9:40 AM Morning Break			
3	9:40 AM – 10:30 AM Highlights of 2009 Federal Tax Law Foreign Bank and Financial Accounts Reporting	1 Tax	Richard Furlong <i>Internal Revenue Service</i>
4	10:35 AM – 11:25 AM IRS Enforcement Initiatives; IRS Tax Return Preparer Review, IRS Potpourri	1 Tax	Richard Furlong <i>Internal Revenue Service</i>
11:25 AM – 12:05 PM Buffet Brunch			
5	12:05 PM – 12:55 PM Compelling Income Tax Planning Opportunities	1 Tax	Gerry Fraley <i>Bernstein Global Wealth Management</i>
6	1:00 PM – 1:50 PM Elections and Transition Rules	1 Tax	Bill Antheil, JD, LLM(tax) <i>Antheil, Maslow & Madison</i>
1:50 PM – 2:00 PM Afternoon Break			
7	2:00 PM – 2:50 PM State Tax Update & Individual Educational Tax Incentives	1 Tax	Mark Anderson <i>Kreisher Miller</i>
8	2:55 PM – 3:45 PM Hot Corporate and Business Tax Topics	1 Tax	Mark Anderson <i>Kreisher Miller</i>
3:45 PM - Close		8	CPE Certificate Distribution

Note: Field of Study abbreviations: A&A = Accounting & Auditing, BE = Behavioral Ethics BL = Business Law, F = Finance and Tax = Taxation
No Prerequisites Are Required as **The Learning Objectives** of this entire conference is for the attendee to walk away with a basic understanding of the material presented as well as providing a future authoritative resource. Please see details above.

Late Fall Conference

Friday, November 20, 2009

Registration Form

Registration fee includes Continental Breakfast, Buffet Lunch and all Coffee Breaks.

Please fill out one form for each person attending.

Total amount enclosed: \$ _____

Please make your check payable to **IMA-MAC** and please mail it to **Amy Snyder** at
11 Summerhill Dr., Downingtown PA 19335

	Cost	Paid After 11/13	Half-Day
<input type="checkbox"/> Members	\$145	\$170	\$80
<input type="checkbox"/> Nonmembers	\$195	\$220	\$105

For Half-Day, please circle AM or PM

Name: _____

Firm: _____

e-mail address: _____

Mandatory
Mailing address (of credit card if one is used):

Telephone Number (of credit card if one is used):

Mandatory

IMA Membership Number: _____

Mandatory if IMA Member

IMA Chapter Affiliation: _____

CMA CFM CPA State _____

Credit Card Information: Expiration date _____

Number _____

Signature _____

Please note that all Credit Cards are processed and payable through Joanne Newfield Associates not IMA Mid Atlantic Council