

Serve your clients to the best of your ability by keeping updated on all of the recent changes and developments in income tax, tax litigation, and the Louisiana Legislature. Don't miss out on this chance to get your questions regarding the Department of Revenue answered! Get everything you need to be successful at the **Second Annual Louisiana State and Local Tax Workshop!**

*You Won't Want to Miss These Exciting Sessions!*

- **Louisiana Legislative Update** with Robert S. Angelico, CPA, JD

- **Nexus – General Overview from the Multistate Tax Commission Perspective** with Thomas K. E. Shimkin
- **Hot Topics in Income Tax** with Annie Gunn and Jay Frost
- **Hot Topics in Tax Litigation** with Kimberly Robinson and Shone Pierre
- **Louisiana Economic Development Tax Incentives** with Kenneth J. Abney, CPA, Marylyn Friedkin, and Larry Joseph
- **Hot Topics in Sales Tax** with J. A. Cline, Peggy Parker, Christopher McFarlane
- **E-Services Update** with Richard "Rick" Mekkessie, Barbara Davis
- **Louisiana Department of Revenue Update - What's New and What We Can Do For You** with Cynthia Bridges, Barbara Davis, A. Boyd Winn, and Kerry Alley

## HOTEL INFORMATION

Hilton Baton Rouge Capitol Center, 201 Lafayette Street Baton Rouge, LA 70802 Rate: \$129 Single/Double. Please call 225-344-5866 and identify yourself as attending the LCPA Louisiana State and Local Tax Workshop. **Block Release Date: June 14, 2009.** Reservations made after this date will be based on availability and may have higher rates.

*Get everything you need to be successful at the*

# 2009 LOUISIANA STATE & LOCAL TAX WORKSHOP

**July 8, 2009 • Hilton Baton Rouge Capitol Center  
8 CPE Credits**

*Sponsored by the Society of Louisiana CPAs in conjunction with the  
Louisiana Department of Revenue*



**LOUISIANA STATE & LOCAL TAX WORKSHOP**  
July 8, 2009 • Hilton Baton Rouge Capitol Center • 8 CPE Credits

2400 Veterans Blvd., Suite 500  
Kenner, LA 70062-4739

SOCIETY OF LOUISIANA  
CERTIFIED PUBLIC ACCOUNTANTS



# 2009 LOUISIANA STATE & LOCAL TAX WORKSHOP



7:45 - 8:25 am  
**REGISTRATION/CONTINENTAL BREAKFAST**

8:25 - 8:30 am  
**WELCOME**  
Cynthia Bridges • Secretary of the Louisiana Department of Revenue • Baton Rouge, LA  
Grady R. Hazel, CPA • Executive Director • Society of Louisiana CPAs

8:30 - 9:20 am  
**LOUISIANA LEGISLATIVE UPDATE**  
Robert S. Angelico, CPA, JD • Shareholder • Liskow Lewis • New Orleans, LA  
Robert Angelico covers the state and local tax developments coming out of the 2009 Legislative Session. Explore the numerous tax bills covering any additions and/or changes in taxpayer breaks in many areas of tax.

9:20 - 10:10 am  
**NEXUS - GENERAL OVERVIEW FROM THE MULTISTATE TAX COMMISSION PERSPECTIVE**  
Thomas K. E. Shimkin • Director National Nexus Program • Multistate Tax Commission  
The National Nexus Program was created by the Multistate Tax Commission to foster increased state tax compliance by business that is engaged in multi-jurisdictional commerce, establish national cooperation in the administration of state tax issues arising in the nexus area, facilitate taxpayer compliance through education as to a taxpayer's state tax reporting responsibility, provide cooperative services to multistate taxpayers to simplify the compliance process, and promote fair, even-handed and consistent state tax enforcement in the nexus area. Many issues pass through this program. In this session, learn the current hot issues that have arisen in the recent past in the Nexus arena.

10:10 - 10:20 am - **BREAK**

10:20- 11:10 am  
**HOT TOPICS IN TAX LITIGATION**  
Kimberly Robinson, JD • Jones, Walker, Waechter, Poitevent, Carrère & Denègre • New Orleans, LA  
Shone Pierre • Assistant Secretary • Office of Legal Affairs • Louisiana Department of Revenue • Baton Rouge, LA  
Hear presentations on the ramifications from the state point of view as well as the practitioner legal point of view of recent court decisions and pending litigation.

11:10 am - 12:00 pm  
**LOUISIANA ECONOMIC DEVELOPMENT TAX INCENTIVES**  
Kenneth J. Abney, CPA • Partner Silva and Associates • New Orleans, LA  
Marylyn Friedkin • Business Incentives Division • Louisiana Economic Development • Baton Rouge, LA  
Larry Joseph • Revenue Tax Director • Office Audit Division • Louisiana Department of Revenue  
In these difficult economic times everyone is looking to spend wisely and save money and resources. There are more state incentive programs out there than most people know, dealing with such things as: Enterprise Zones, Quality Jobs, Restoration Tax Abatement, Industrial Tax Exemption Program, Research and Development, Tax Equalization Program, Major Projects Development Authority, Governor's Rapid Response Fund, LA Workforce Development and Training Program, Headquarter Growth Program, Retention and Modernization Program, Rail Rolling Stock Tax exemption, Motion Picture Industry Development Tax Credit, Digital Media Tax Credit and Sound Recording Tax Credit. Learn from our panel's three perspectives what the governor and legislature may have kept, how the programs are being used and the overall tax implications.

12:00 - 1:00 pm - **LUNCH** (Included)

1:00 - 1:50 pm  
**HOT TOPICS IN INCOME TAX**  
Annie Gunn • Revenue Tax Attorney • Policy Services Division • Louisiana Department of Revenue  
Jay Frost • Revenue Tax Director • Field Audit Services • Louisiana Department of Revenue  
You have heard how other states are supposed to deal with Louisiana tax issues, now hear how Louisiana is supposed to deal with other state tax issues such as LA Income Tax Nexus-Individual

Income Tax (taxation of out of state residents, domicile, residency); and LA Corporate Taxes (apportionment factor and definition; R.S. 47:287.480) plus additional hot topics.

1:50 - 2:40 pm  
**HOT TOPICS IN SALES TAX**  
J. A. Cline • Assistant Revenue Tax Director • Field Audit Services • Louisiana Department of Revenue  
Peggy Parker • Revenue Research Analyst • Tax Administration Division • Louisiana Department of Revenue  
Christopher McFarlane • Revenue Research Analyst • Tax Administration Division • Louisiana Department of Revenue

In Louisiana the sales tax is a general tax levied on retail sales of tangible personal property or on its lease or rental and on the furnishing of specified services. Specified services include lodging and associated storage and parking, admissions, printing, cleaning, cold storage, and repairs of tangible personal property, and telecommunications. When it comes to sales and use tax, Louisiana is different than other states in many ways. This session addresses current issues relative to lease and rental, Use Tax; the repeal of Sales Advance Tax, TIFs and consolidated sales tax filers, and other hot topics.

2:40 - 2:50 pm - **BREAK**

2:50 - 3:40 pm  
**E-SERVICES UPDATE**  
Richard "Rick" Mekdessie • President • RAMware, L.L.C., "Sales Tax Manager" • Baton Rouge, LA  
Barbara Davis • Executive Management Officer • Office of Group 2 • Louisiana Department of Revenue • Baton Rouge, LA  
Individuals and practitioners can, and in some cases are mandated to, e-file virtually any individual income tax return, from the most simple to the very complex. Refunds and liabilities are handled electronically through the Department of Revenue. Tax software can identify and correct many common errors that could delay refunds and filing can occur around the clock, 24/7. Hear from the experts how to successfully complete these processes with specific info regarding the Parish E-File and CIFT E-File system, bulk filing of state extensions, and other electronic services of interest.

3:40 - 4:30 pm  
**LOUISIANA DEPARTMENT OF REVENUE UPDATE - WHAT'S NEW AND WHAT WE CAN DO FOR YOU**  
Moderator: Cynthia Bridges • Secretary of the Louisiana Department of Revenue • Baton Rouge, LA  
Barbara Davis • Executive Management Officer • Office of Tax Administration, Group 2- Louisiana Department of Revenue • Baton Rouge, LA  
A. Boyd Winn • Revenue Tax Director • Revenue Processing Center • Louisiana Department of Revenue • Baton Rouge, LA  
Kerry Alley • Regional Director • Thibodaux Regional Office • Louisiana Department of Revenue • Thibodaux, LA  
The mission of the Louisiana Department of Revenue is to administer applicable laws and collect revenues to fund state operations. Find out what is happening in the department and what they can do for you to make your job and theirs easier. Included will be information regarding the following:  
a. 10 mistakes to avoid (documentation; return completion)  
b. Individual Income Tax Filing Stats and Refund Turnaround Time  
c. Correspondence, including billing notices and tax return change notices  
d. Changes on cross period offsets  
e. Tax Professional Mailboxes

*Don't miss out on this chance to get your questions regarding the Department of Revenue answered! Cynthia Bridges, Secretary of the Louisiana Department of Revenue, speaks on tax modernization and offers a special Q&A session for Workshop Participants.*

**Category:** Taxation  
**Level:** Update

## LOUISIANA STATE & LOCAL TAX WORKSHOP

July 8, 2009 • Hilton Baton Rouge Capitol Center • 8 CPE Credits • (LASTW)

Are you an LCPA Member?  Yes  No  
If you are not an LCPA Member, please answer the following questions.  
Are you a CPA?  Yes  No  
If no, is a member of your firm/employer an LCPA member?  Yes  No  
If yes, please list LCPA Member name: \_\_\_\_\_

Are you a member of another State society?  Yes  No  
If yes, please list State Society: \_\_\_\_\_

Do you require MCLE Credit?  Yes  No  
If yes, please add \$50.00 to your registration fee for the program.

Name: \_\_\_\_\_ LCPA I.D. Number \_\_\_\_\_  
Firm/Employer: \_\_\_\_\_  
 Please check here if this is a new address  
Address: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
Business Phone: ( \_\_\_\_\_ ) \_\_\_\_\_  
Business Fax: ( \_\_\_\_\_ ) \_\_\_\_\_  
 Please check here if this is a new E-mail address  
E-mail Address: \_\_\_\_\_  
Total Amount \$ \_\_\_\_\_  
 Check Enclosed

Visa  MasterCard  Discover Card  American Express

Credit Card # \_\_\_\_\_  
Expiration Date: \_\_\_\_/\_\_\_\_/\_\_\_\_ CVS# \_\_\_\_\_  
Cardholder's Name as Printed on Card: \_\_\_\_\_  
Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Early Registration Fee ..... \$230  
Registration Fee on or After June 12 ..... \$255

### Mandatory Continuing Legal Education (MCLE)

In addition to completing the LCPA CPE credit form, you must ask the LCPA course coordinator for the MCLE form. At the conclusion of the course, both forms must be turned in to the LCPA course coordinator. Forms cannot be turned in after the course.

#### Payment Is Due Prior To The Course Date.

Mail Registration Form and Payment To:  
**LCPA**  
2400 Veterans Blvd., Suite 500 • Kenner, LA 70062  
(504) 464-1040 • 800-288-5272 • Fax (504) 469-7930  
Register Online: <http://www.lcpa.org>

Make Checks Payable to LCPA

#### A.D.A. COMPLIANCE NOTICE

In order to comply with the Americans With Disabilities Act, we request that if you have a disability, please let us know at least ten days prior to the event if alternative accessible arrangements are required.