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Rev. 8/06



Phoenix Tax Workshop

7204 N. 16th Street, Suite 100, Phoenix, AZ 85020
(602) 850-5100 • FAX (602) 850-5115 • www.aztax.org

The next regular monthly meeting of the Phoenix Tax Workshop will be held **Saturday, January 20, 2007 from 9:00 a.m. until 12:00 noon. *Guests/Non-members are welcome with advance notice and a \$55.00 fee.***

Today's Focus

MAKE READY FOR TAX SEASON/ARIZONA LEGISLATIVE CHANGES/SOCIAL SECURITY UPDATE/EXTENDERS

- A. DISCUSSION OF CURRENT DEVELOPMENTS.** Current tax issues, recent significant tax and business events, and practitioner comments will be reviewed and discussed.

Ira Feldman, CPA

Chairman, Phoenix Tax Workshop
ira@aztax.org

NOTE: please e-mail any topics of a current event nature to Ira if you would like to have it included in the discussion.

- B. SOCIAL SECURITY—WHAT'S THE MAGIC AGE—62, 65 OR LATER? WHAT IS "COUNTABLE" INCOME FOR SS PURPOSES?** Mr. Pavletich is the Public Affairs officer with the Social Security administration. Joyce Rolfes is a CPA, financial planner and Advisory Board member.

James Pavletich

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- C. 2006 ARIZONA INCOME TAX UPDATE.** Our speaker, author of the *Arizona 2006 Income Tax Guide* will review the most significant changes that have occurred this year.

Edward Zollars, CPA

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- D. WHEN LOVE HAS GONE. WHAT EVERY PRACTITIONER SHOULD KNOW ABOUT INNOCENT SPOUSE RELIEF.** Our speaker will review a case he recently argued before the Arizona Court of Appeals.

Jack Schiffman, Esq

Trompeter, Schiffman, Petrovits, Friedman & Hulse, LLP
jschiffman@lawyertax.com

- E. TAX RELIEF AND HEALTH CARE ACT OF 2006.** You will find out if you are really “relieved” after our speaker reviews the significant provisions of this “lame duck” extender bill. Don’t eat breakfast because there is sure to be some pork here!

David P. Meese, CPA

David P. Meese, CPA, PLC
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2006-2007 MEETING SCHEDULE

September 16, 2006

October 21, 2006

November 18, 2006

January 20, 2007

February 17, 2007

April 28, 2007

May 19, 2007

June 16, 2007

GENERAL INFORMATION:

Our meetings are held at the ASU Extended Learning Facility (*formerly the Mercado*) in Downtown Phoenix, at the corner of Monroe and 5th Street. Parking will be validated for parking at the Heritage Square parking lot (*same as used for the Science Center*). Enter on the south side of Monroe between 5th Street and 7th Street, just across the street from the facility. The meeting location will be posted on the marquee just inside the lobby. (*most are scheduled for Room C368/370 on the 3rd floor*).