



Phoenix Tax Workshop

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Rev. 8/07

The next regular monthly meeting of the Phoenix Tax Workshop will be held Saturday, November 17, 2007 from 9:00 a.m. until 12:00 noon. *Guests/Non-members are welcome with advance notice and a \$60.00 fee.*

TODAY'S FOCUS

AZ INCOME TAX CREDITS/GIFT TAX/S CORP

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

Ira S. 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. AZ INCOME TAX CREDITS FROM THE ADOR POINT OF VIEW. Our speaker is Georganna Meyer with ADOR. She will focus on ADOR challenges in processing and auditing the multitude of credits available on the Income Tax Return and offer suggestions as to how your clients can best meet the reporting requirements when claiming the credits.

Georganna Meyer
Arizona Department of Revenue
gmeyer@ador.gov

C. GUIDE TO THE GIFT TAX ANNUAL EXCLUSION. The \$12,000 Annual Gift Tax Exclusion is not that simple. Our speaker, a PTW Advisory Board member will remind us of the complexities at this "gifting season."

James F. Polese, Esq.
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D. S CORP AND PASSIVE INCOME. Our speaker, a member of our Advisory Board, will review how to plan around the special rules that apply to passive income of an S Corp.

Barry R. Friefield, CPA
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E. ORGANIZING THE ESTATE—BEFORE AND AFTER DEATH

TBA

2007-2008 MEETING SCHEDULE

September 15, 2007

October 20, 2007

November 17, 2007

January 12, 2008

February 16, 2008

April 26, 2008

May 17, 2008

June 21, 2008

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*).