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# **62<sup>nd</sup>**

## **Annual**

# **Tri-State Tax Institute**

**Tuesday,**

**October 22, 2019**

**The Highlands Center  
West Liberty University**

[www.westlibertyuniversity.edu/taxinstitute](http://www.westlibertyuniversity.edu/taxinstitute)

### **OUR MISSION STATEMENT**

**to offer topical presentations by distinguished  
speakers to the largest possible audience**

**and**

**to provide academic scholarships to deserving  
accounting students.**

*Register by mail, phone, fax or email:*

Tri-State Tax Institute  
West Liberty University  
Attn: Mary Ann Edwards  
208 University Drive, CUB #142  
West Liberty, WV 26074  
304-336-8000

Email: [edwardsm@westliberty.edu](mailto:edwardsm@westliberty.edu)

**Name** \_\_\_\_\_

**Title or attach business card** \_\_\_\_\_

**Company** \_\_\_\_\_

**Street Address** \_\_\_\_\_

**City** \_\_\_\_\_

**State** \_\_\_\_\_ **Zip** \_\_\_\_\_

**Email** \_\_\_\_\_

\_\_\_\_ Individual

\_\_\_\_ Team Discount (3 or more)

### **REGISTRATION FEES:**

	<b>Register Before 9/20/19</b>	<b>Register Before 9/21/19</b>
____ Individual	\$170	\$190

____ Team Discount (3 or more)	\$150 ea.	\$170 ea.
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Please make checks payable to:  
***West Liberty University***

### **For Credit Card Payments:**

Below are the steps to take for credit card payments.

1. Call the Business Office at 304-336-8013.
2. Please have your credit card information available.

## AGENDA

7:30 a.m. Registration  
8:15 a.m. Welcoming Remarks

8:30 a.m. to 11:00 a.m.

**Robert S. Keebler, CPA/PFS, MST, AEP**  
Keebler & Associates, LLP  
*QBID/Tax Cuts*

11:00 a.m. to 12:15 p.m.

**Linda A. Duessel, CFA, CPA, CFP**  
Federated Securities Corp.  
*Economic Update*

12:15 p.m. to 1:00 p.m. Lunch

1:00 p.m. to 2:00 p.m.

**Mark B. Schwendeman, GBA**  
Schwendeman Agency, Inc.  
*Health Insurance*

2:00 p.m. to 3:15 p.m.

**Joseph P. Gartner, CPA**  
Deloitte Tax LLP  
*Tax Updates*

3:30 p.m. to 5:00 p.m.

**Scott Fleming, PhD, CPA, CMA**  
Associate Professor of Accounting  
*Ethics and Tax Evasion*

## **Robert Keebler, CPA/PFS, MST, AEP (Distinguished)**

Mr. Keebler will address the critical planning aspects of 199A that lawyers, CPAs and planners need to know, including an overview of 199A, SSTB rules, real estate ideas, what is a trade or business, using pensions to reduce income, choice of entity, SSTB issues and how to enhance the deduction, and when not to contribute to a pension or profit sharing plan. He will also address the latest planning ideas and latest bills in Congress, including the post-mortem IRA payout rules and the Democratic estate and gift tax proposals.

## **Linda A. Duessel, CFA, CPA, CFP**

Ms. Duessel will review and discuss key issues affecting, and that will likely affect, the economy in the near term, including her outlook for major world economies and recent developments in the U.S and global financial markets.

## **Mark B. Schwendeman, GBA**

Mr. Schwendeman will review legislative updates to health insurance and employer challenges in balancing benefits and cost.

## **Joseph P. Gartner, CPA**

Mr. Gartner will review Federal tax law changes for the current year, pending/proposed legislation in Washington, DC, and updates on 2017 corporate tax reform, including new regulations, notices and rulings.

## **A. Scott Fleming, PhD, CPA, CMA**

Dr. Fleming will discuss various ethical, moral, and psychological associations to those who evade taxes; other potential social and psychological precedents and antecedents to deviant behavior of same; and notable whistleblowing actions with the IRS.

## **Address**

355 Wharton Circle, Suite 200  
Triadelphia, WV 26059

Take Interstate 70, exit 10. If coming from the east, turn right at the end of the exit. If coming from the west, curve to the right at the end of the exit ramp. Proceed on Cabela Drive past WesBanco, Wendy's, Target, and Kohl's. Go straight through the last stop light and turn right into our parking lot.



The entrance will be the first door on the front side of the building. Once you enter the lobby of the West Liberty building there will be stairs immediately on your right and an elevator to your left that take you directly to the WLU entrance.

## **CEU Credits Approved**

WV Accountancy (1.5 ethics)	8 Hrs.
OH Accountancy (1.5 ethics)	8 Hrs.
PA Accountancy (1.5 ethics)	8 Hrs.
WV CLE (1.8 for ethics)	9 Hrs.
OH CLE	Hrs.
PA CLE (1.5 for ethics)	7 Hrs.
CTFA:	
- CISP	Hrs.
- CRSP	Hrs.
WV Insurance – General	Hrs.
OH Insurance	8 Hrs.
CFP	9 Hrs.

## **Registration Fee**

	<b><u>Individual</u></b>	<b><u>Team</u></b>
Register before 9/20/19	\$170	\$150/each
Register on or after 9/21/19	\$190	\$170/each

## **Team Discounts**

Participants are entitled to a team discount when three or more people from the same organization attend and register at the same time.

## **Substitutions**

Substitutions may be made at any time before October 1, 2019 with no penalty; however, please notify Mary Ann Edwards by calling 304-336-8000 or [edwardsm@westliberty.edu](mailto:edwardsm@westliberty.edu).

## **Cancellation Policy**

Full refunds will be given for written or e-mailed cancellations received before October 1, 2019. No refunds for cancellation after that date.



**WEST LIBERTY  
UNIVERSITY**