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Program Sponsors:

62nd Annual Tri-State Tax Institute

**Tuesday,
October 22, 2019
The Highlands Center
West Liberty University**

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

Name _____

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REGISTRATION FEES:

	Register Before 9/20/19	Register Before 9/21/19
_____ Individual	\$170	\$190
_____ Team Discount (3 or more)	\$150 ea.	\$170 ea.

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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.

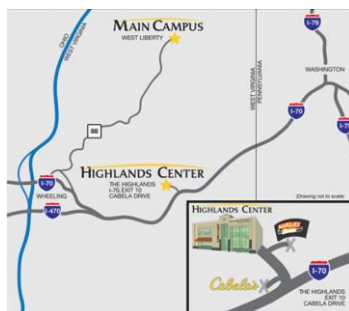
A. Scott Fleming, PhD, CPA, CMA

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:	Hrs.
- CISP	Hrs.
- CRSP	Hrs.
WV Insurance – General	Hrs.
OH Insurance	8 Hrs.
CFP	9 Hrs.

Registration Fee

	<u>Individual</u>	<u>Team</u>
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.

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.



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