

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 _____

Title _____
(or Attach Business Card)

Company _____

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REGISTRATION FEES:

	Register Before 9/27/19	Register On or After 9/28/19
____ Individual	\$170	\$190
____ Team Discount (3 or more)	\$150 ea.	\$170 ea.
____ Printed material fee (optional)	\$30 ea.	

Please make checks payable to:
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**NOTE: There will be a \$30 additional fee
for printed materials.**

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
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OR

Pay online at: westliberty.edu/tsti-pay

OUR MISSION STATEMENT

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

and

to provide academic
scholarships to deserving
accounting students.

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62nd ANNUAL

TRI-STATE TAX INSTITUTE

October 22, 2019

West Liberty University
HIGHLANDS CENTER

westliberty.edu/tristatetax

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WEST LIBERTY UNIVERSITY

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

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PRESENTERS

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.

DIRECTIONS

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 (1.5 for attorney conduct)	8 Hrs.
PA CLE (1.5 for ethics)	7 Hrs.
CTFA (American Bankers Assoc.):	8 Hrs.
5 - CISP Hrs.	
6 - CRSP Hrs.	
WV Insurance - General	8 Hrs.
OH Insurance	8 Hrs.
CFP	9 Hrs.

REGISTRATION FEE

	Individual/Team
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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