



Ohio State Society of Enrolled Agents

2010 Educational Seminar
& Annual Convention

September 26, 27 & 28, 2010

Maumee Bay Resort and Conference Center
1750 Park Road # 2
Oregon, OH 43618



Ohio State Society of Enrolled Agents

OSSEA c/o Kay Hill, EA
412 E. Edgar Ave.
Findlay, OH 45840



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15th Annual Convention Maumee Bay State Park September 26-28, 2010

Sunday- Sept. 26, 2010 – 3 Hrs. CPE

10:00 – 1:00 pm	Board meeting/lunch
1:00 – 2:00 pm	Registration
2:00 – 2:15 pm	Welcome & Announcements
2:15 – 4:00 pm	“Recent Changes in <i>Federal Taxation</i>”, David Kisha, EA
4:00 – 4:20 pm	Break
4:20 – 5:15 pm	Keynote Address, Michael Nelson, CAE, EVP - NAEA
5:15 – 6:30 pm	Rest & Relax
6:30 – 9:00 pm	Picnic/Entertainment
9:00 – 11:00 pm	Hospitality Room

Monday- Sept. 27, 2010 – 7 Hrs. CPE

Again this year, we are offering a “dual-track” format for today. Attendees will have a choice of topics to choose from for each education session. Please watch for signage to direct you to the proper room for the topic of your choice.

7:00 – 8:00 am	Continental Breakfast
7:00 – 8:00 am	Registration

TRACK 1

8:00 – 9:45 am	“Subchapter S Issues”, “Implications of the Health Care Act”, Richard Ayres, EA, ATA
9:45 – 10:05 am	Break
10:05 – 11:00 am	“Calculating Gambling Wins & Losses”, Al Mitchell, EA
11:15 – 12:15 pm	Ohio’s Annual Membership Meeting
12:15 – 1:15 pm	Lunch

TRACK 2

“Ethics Jeopardy, Part 2”, Continued from 2009 Kevin Huston, EA
“Schedules C & E”, Northwest Chapter
Michigan’s Annual Membership Meeting



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Monday- Sept. 27, 2010 – 7 Hrs. CPE (cont.)

TRACK 1

- 1:15 – 3:00 pm **“Representation Issues”**
 Marc Dombrowski, EA
- 3:00 – 3:30 pm Exhibitor Break
- 3:30 – 5:15 pm **“Clergy Taxation Issues”**,
 Glenna Stout, EA
- 5:15 – 6:00 pm Rest & Relax
- 6:00 – 6:30 pm Reception/cash bar
- 6:30 – 9:00 pm Banquet & Entertainment
- 9:00 – 11:00 pm Hospitality Room

TRACK 2

- “Estate Income Tax Issues”**
 Steve Lauer, Esq.
- “Basis: An Overview”**
 Kevin Huston, EA

Tuesday- Sept. 28, 2010 – 7 Hrs. CPE

- 7:00 – 8:00 am Continental Breakfast
- 7:00 – 8:00 am Registration
- 8:00 – 9:45 am **“Bank Secrecy Act”**, Theresa McGill
- 9:45 – 10:05 am Break
- 10:05 – 12:00 am **“IRS Update”**, LaTonya Bacon
- 12:00 – 1:00 pm Lunch
- 1:00 – 2:45 pm **“Ohio Update”**, Del Harlan, Deborah Smith
- 2:45 – 3:05 pm Break
- 3:05 – 4:00 pm **“Federal Tax Issues Roundtable”**
 A moderator will encourage audience participation with a discussion on the following topics:
 “Filing Status Issues”
 “Dependency Issues”
 “Earned Income Tax Credit”



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About our instructors

Richard E. Ayres, EA, ATA is president of Ayres Accounting & Co., established in 1966, whose firm specializes in agricultural accounting and taxation, tax consulting, and management advisory services. He has taught extensively in Ohio and surrounding states.

LaTanya J. Bacon serves as the Senior Stakeholder Liaison with the Stakeholder Liaison Field Office/Great Lakes Area of the Internal Revenue Service.

Marc J. Dombrowski, EA is Vice President of Tax Help Associates in Buffalo, New York. Marc Dombrowski, EA has specialized in representing clients since 1994. He is vice president of Tax Help Associates, Inc., a Buffalo, New York based firm that focuses on collection issues. Dombrowski's extensive experience as an instructor includes a variety of collection representation courses at NAEA chapter and state meetings and he has taught for the IRS on e-Services. As a well-known speaker and author for popular industry publications including EA Journal, his recognized expertise has allowed him to become a contributor for CNBC Money Talk. Dombrowski holds a BS in Business Studies from the SUNY system. He is a proud NTPI Fellow and is a Level 2 NTPI track instructor.

Del Harlan has been the Executive Administrator of several divisions since October 1, 2007. His responsibilities include management oversight of the Personal & School District Income Tax, Business Tax and Forms Design Divisions.

Kevin Huston, EA, owner of the three-person Arden, N.C.-based Blue Ridge Tax Advisors. Kevin C. Huston, EA is the president of Blue Ridge Tax Advisors Inc., in Asheville, North Carolina. Huston has earned the chartered financial consultant (ChFC) and certified life underwriter (CLU) designations from the American College in Bryn Mawr, Pennsylvania. He received his BS in Business Management from Oakland University in Rochester, Michigan and his MBA in International Business from Georgia State University in Atlanta. He is a nationally known tax instructor and has authored several tax and financial articles for professional journals. Huston is an NTPI Fellow and is teaching in the Tax Prep/Practice Management track.

David A. Kisha, EA of American Tax & Investment Services in Milford, OH is a member of OSSEA and has taught for NATP and currently is an instructor with the Professional Tax Institutes (PTI).

Stephen Lauer, Esq. is a staff attorney with the IRS in the Estates and Trust Division and is currently assigned to the Toledo office.

Theresa McGill is a Senior BSA Specialist with the Internal Revenue Service.

Al Mitchell, EA is the current President of the Greater Cincinnati Chapter of OSSEA.

Deborah Smith is the Administrator of the Personal Income & School District Income Tax divisions. She comes to this position with over twenty years of tax experience, both private and public sector. During her tenure with the Ohio Department of Taxation, Deborah has served as the Administrator of the Commercial Activity Tax division for two years; Supervisor of the Personal Income and School District Income Tax Division; and as an Auditor in the Excise Division.



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Glenna Stout, EA is President and Executive Manager of Glenna Stout, EA, Inc. She is a highly skilled career professional with more than 25 years practical experience in Tax Preparation, Tax Representation and small business services. Glenna has an Associate of Applied Business, Accounting from Terra Community College and a Bachelor of Arts in Organization Management from Bluffton College. Glenna Stout is also an Adjunct Faculty of Terra Community College.

Bring the Entire Family



Welcome to the beautiful shores of Lake Erie. A ten-minute drive from Toledo takes you to a part of heaven on earth. Here seagulls soar, wildflowers bloom and the deer roam freely in the park. This is Maumee Bay Resort and Conference Center. You can enjoy the indoor pool or sit outside and enjoy the boats that sail by the shore. There is a wildlife refuge boardwalk for those that like to walk with nature. Tennis and racquetball courts and an 18-hole championship Scottish Link golf Course are available for the sport enthusiast. The Waters Edge Restaurant has spectacular views of the lake from your table. For those that are looking for a little more peace and quiet you can enjoy a crackling fire or just sit on your own private balcony and enjoy the wildlife.

Most of the rooms have balconies overlooking the lake. There are also cabins available for those who want to be closer to nature. There are standard 2 bedroom, 4 bedroom and a 4 bedroom Jacuzzi cabins. These require a short drive from the lodge. Reservations for rooms can be made until August 25th at the conference rate of 95.00 for Sunday – Tuesday by calling 1-800-282-7275. These rooms include doubles, king, lakeview and non-lakeview. For those interested in cabins, they are 180.00 for 2 bedroom, 250.00 for 4 bedroom and 370.00 for Jacuzzi. Reservations are available for Saturday, but at a different rate except for double which is also 95.00.

Just remember when you pack your suitcase, this is resort time. Come comfy, stay comfy and just enjoy this quiet time.

Sunday Event

Our entertainment plans for Sunday night will be just a little different than in past years. We are planning outdoor activities including a picnic, outdoor games, a bonfire and a sing-a-long. Bring your competitive spirit, your musical talent, outdoor clothes and a big appetite. There will be prizes and fun galore. We will put all that education to rest and just have a night of FUN!

Monday Night Banquet

Our banquet night will include a visit from “Toledo’s Other Bag Lady”. Jeanene’s program is centered around her unique collection of tote bags and anecdotes that combine with fun, humor, music and inspiration. Her music includes some of the old songs that we all remember, Ramblin Rose, Tea for Two, Beautiful Ohio, Alley Cat and more. She is a native of Lima and has taught elementary education and music in Toledo Public Schools. She is also a licensed counselor, a church organist and sings with the Michigan/Ohio Concert Choir. We look forward to her uplifting program following our banquet.

