



2020 Resort Conference & Self-Study Programs



**Early
Registration
Discounts by
January 31,
2020**

**CPE for Accountants
in Public Accounting
and Industry**

TIMELY TOPICS

Taxation

Prerequisite: Basic understanding of taxation

Advanced preparation: None

Field of Study: Taxes

Level: Overview

Recommended CPE hours: 6* Objectives and descriptions are noted below

Delivery method: Group live

Individual Tax Update - 2020

Objective: To discuss recent developments related to federal income taxation of individuals including new regulations and other changes related to tax reform

This course focuses on recent 2020 tax developments related to individuals, including new IRS regulations and procedures pertaining to implementation of the Tax Cuts and Jobs Act. Topics include new developments in 2020 including new IRS regulations and revenue procedures issued that address specific sections of TCJA, problem areas, pending additional changes, and more.

Recommended CPEs: 6 hours. Field of study: Taxes.

Business Tax Developments- 2020

Objective: To address recent developments related to the federal income taxation of businesses including all new regulations related to tax reform.

This course addresses those changes and newly issued IRS regulations and other guidance. Topics include: evaluating the choice of entity (C versus S) decision in light of the new Section 199A 20% deduction, the special small business elections for cash basis of accounting, planning under the expensing rules using bonus and Section 179 depreciation, addressing changes to like-kind exchanges, changes to net operating losses, anti-abuse provisions, guidance on defining deductible meals and entertaining, and more.

Recommended CPEs: 6 hours. Field of study: Taxes.

2020 Estate, Gift, Benefits and Retirement Planning Update Parts 1 and 2

Objective: To discuss a variety of new developments related to estate, gift, employment benefits and retirement planning.

This course deals with the 2020 estate, gift, benefits and retirement planning, including new regulations and other continued guidance related to the TCJA changes. Topics include taking advantage of the new higher estate tax exemption, focusing on income tax basis in an estate planning, state estate issues, planning for benefits in light of tax reform, changes made to retirement plans and IRAs, overall estate and gift tax planning in the new tax environment, retirement planning, and more.

Recommended CPEs: 6 hours per day. Field of study: Taxes

“The perfect blend of high-quality education and impressive leisure for my family.”

James Douglas, CPA, Michigan

Income Tax, Public Benefits, and Estate/Lifetime Planning for Families- Part 1 and 2

Objective: To discuss a variety of unique tax and financial planning issues related to families and their members and include recent tax changes under the Tax Cuts and Jobs Act that affect such planning.

This course reviews the tax planning issues (including up-to-date tax changes) confronted in family circumstances; such as planning for couples contemplating divorce, nontraditional families and couples, parents of children with special needs and the expanded definition of disabilities, and unique financial and tax planning issues that pertain to these special circumstances.

Recommended CPEs: 6 hours each day (12 hours total). Field of study: Taxes

Accounting and Auditing

Prerequisite: Basic understanding of accounting and auditing

Advanced preparation: None

Field of Study: Accounting or Auditing

Level: Overview

Recommended CPE hours: 6* Objectives and descriptions are noted below

Delivery method: Group live

2020 A&A Update and Review

Objective: To discuss a variety of new developments related to accounting and financial reporting. This course deals with the latest changes in accounting, auditing and compilation and review pronouncements of interest to accountants in public accounting and industry. Topics include recently issued FASB and AICPA accounting statements, new developments in compilation and review, recently issued auditing pronouncements, practice issues related to peer review, new ethics rulings, and more. Recommended CPEs: 6 hours. Field of study: Accounting and Auditing (4 hours Accounting, 2 hours Auditing).

*Each course consists of 6 hours of Group Live CPE. In addition to the Group Live CPE offered, participants can choose from a selection of self-study courses that supplement the remainder of their total CPE hours purchased. Self-study courses will be distributed at the conferences, or downloaded on-line in a PDF format. Recommended CPE hours are based on the NASBA's Registry-QAS measurement of 50 minutes per CPE hour. Certain states grant CPE credit using different measurements. Please consult with your state licensing board.

For conference registration or information: **888-515-3674 Ext 1** fax: 888-552-9749

IMPRESSIVE SPEAKERS

THOMAS M. BRINKER, JR., CPA, PFS, ChFC, CFE, AEP

Professor of Accounting at Arcadia University in Glenside, Pennsylvania and Executive Director for the MBA program. He graduated cum laude from Saint Joseph's University in Accountancy, and holds masters degrees in Taxation and Accounting from Widener University.

STEVEN C. FUSTOLO, CPA, MBA

Partner with the CPA firm of James J. Fox & Company. AICPA author and national columnist for various publications including The Practical Accountant. Outstanding Discussion Leader award recipient. Award-winning author of more than nine books and courses.

CHRISTOPHER W. HESSE, CPA

Principal in the national tax office of CliftonLarsonAllen LLP, with more than 35 years of tax experience, includes leading a 200-person tax practice. National speaker and writer on taxation and member of the AICPA Tax Executive Committee. Has testified before legislative committees on tax policy matters.

ALBERT L. GRASSO, JD, LL.M.

An attorney, of counsel to and former President of the law firm of Chuhak & Tecson, PC in Chicago. Author of Al Grasso's Tax Briefs, and other publications. National speaker on taxation, specializing in employee benefits and estate planning.

LARRY JOHNSON, CPA, MST

National lecturer on taxation to accountants and attorneys. CPA with more than 30 years experience with Sikich, a Top-40 CPA firm including acting as National Director of the Tax Exempt Division. Specializes in tax planning related to complicated business transactions, including tax exempt organizations, and philanthropic planning with high-wealth families. Works in tax representation before the IRS, including victories in United States Tax Court. Founding member of the Community Foundation for the Land of Lincoln.

THOMAS P. LANGDON, JD, LL.M., CFA, CFP

Professor of Business Law at the Gabelli School of Business, Roger Williams University, and an adjunct professor of taxation at Georgetown University. Principal in Langdon & Langdon Financial Services, LLC. Nationally recognized author and speaker, and author of several books, as well as dozens of articles.

MICHAEL R. MIRANDA CPA, QKA, AEP

Principal in Miranda CPA & Consulting LLC in Sioux Falls, SD. His tax practice focuses on corporate, individual, estate and gift, and tax accounting. He also provides employee benefit planning and consultation services for qualified and non-qualified plan and welfare benefit plans. A recognized speaker on tax law, employee benefit planning, and estate planning through the country.

NTI is Registered with NASBA and the IRS as a Qualified CPE Sponsor



NTI is registered with the National Association of State Boards of Accountancy (NASBA), as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have the final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org. NTI NASBA Sponsor Number: 103075



NTI has entered into an agreement with the Office of Professional Responsibility, Internal Revenue Service, to meet the requirements of 31 Code of Federal Regulations, section 10.6(g), covering maintenance of attendance records, retention of program outlines, qualifications of instructors, and length of class hours. This agreement does not constitute an endorsement by the Office of Professional Responsibility as to the quality of the program or its contribution to the professional competence of the enrolled individual.

CPE credits earned by enrolled agents directly to the IRS in accordance with the IRS requirements for CPE providers. Enrolled agents must provide us with their PTIN number so that we may report CPE directly to the IRS.

IRS Approval information: Provider Number: BTYZG

For information on our organization, contact information, and complaint resolution, please visit our web site at www.nticpe.com.

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SANTA BARBARA, CA

JUNE 22-28

Whether you enjoy hiking, fine-dining, water sports, lazing on the beach, culture, or a great night-life, Santa Barbara has something for you. **Santa Barbara** is sometimes referred to as the American Riviera®. Its beautiful beaches, majestic mountains, and colorful culture make Santa Barbara a premier resort destination. World-class accommodations and dining await its many visitors. Santa Barbara is a 2-hour drive north from Los Angeles or a short hop from any corner of the world via the Santa Barbara airport. Santa Barbara's harbor is home to world famous Stearns Wharf, a great destination for the entire family. Visiting the zoological gardens makes for a great day-trip.

HOTEL ACCOMMODATIONS:

Low-rise villas with wrought-iron balconies. Beaches that glow under the sun. The water at your doorstep. Vibrant blues and intricate patterns. Food that is meant to be savored with the sunset. **The Ritz-Carlton Bacara, Santa Barbara** embodies the charm, beauty and energy of the Mediterranean in the heart of Santa Barbara, offering ocean-view accommodations, an indulgent spa and dining that celebrates local ingredients. At the Ritz-Carlton Bacara, Santa Barbara, guests can swim in three pools, surf or sail at the beach, receive one-on-one attention from the resident tennis pro, play a round at the adjacent championship golf course or walk the on-property nature trail. Santa Barbara is also home to a thriving arts community, and a festival circuit and winery region, inviting guests to explore beyond the resort to discover more of what the area has to offer. **Hotel Rating: 4-Star**

GROUP BASE HOTEL PACKAGE:

- 7 days/6 nights: Deluxe Courtyard View King- \$1,472 per person, double occupancy, including taxes and resort fee.
- Upgrades: Ocean View King, Club Deluxe Courtyard View King, and One-Bedroom Garden View Suite, limited availability, please ask for details.
- Package excludes the cost of conference fee.

Jun 22	Mon	Arrival 6:30 - 7:00pm	Hospitality Desk - Welcome to Santa Barbara Orientation Meeting
Jun 23	Tue	7:30am-12:50pm 6:00pm- 7:00pm	2020 Estate, Gift, Benefits and Retirement Planning Update- Part 1 CPE Hours: 6 Group Live - Taxes* Reception hosted by NTI
Jun 24	Wed	7:30am-12:50pm 9:00am-10:00am	Individual Tax Update - 2020 CPE Hours: 6 Group Live - Taxes* Spouse/Guest Breakfast
Jun 25	Thu	Day of leisure	No meeting scheduled
Jun 26	Fri	7:30am-12:50pm	2020 Estate, Gift, Benefits and Retirement Planning Update- Part 2 CPE Hours: 6 Group Live - Taxes*
Jun 27	Sat	7:30am-12:50pm	Business Tax Developments - 2020 CPE Hours: 6 Group Live - Taxes*
Jun 28	Sun		Recommended day of departure

Suggested Activities for You and Your Family:

• Mission Santa Barbara • Stearns Wharf • SB Maritime Museum • Courthouse • Santa Barbara Zoo • Santa Barbara Botanic Gardens • Arroyo Burro Beach County Park

***Note:** Continental breakfast will be served in the meeting room starting at 7:00am for participants only. Participants receive 6 CPEs for attending each live session and can receive additional CPEs (equal to the number of CPEs purchased) by completing optional self-study courses. Self-study materials will be available in modules of 2 CPEs and 4 CPEs (taxation and A&A) and will be distributed either by an on-line downloadable PDF format or distributed at the conference in manual format, at the customer's option. Summary of CPEs available at this program: Live Group study= 24 CPEs; Self-Study=16 CPEs for a total of 40 CPEs.



JULY 23-29

JACKSON HOLE, WY

The town of Jackson Hole is reminiscent of the rip-roaring Old West, just five miles from Grand Teton National Park and a one-hour drive to Yellowstone. The town bustles with activity from the famous Cowboy Bar to the nightly sunset cowboy shootout, whitewater rafting, horseback riding, the rodeo, and an old western barbeque nearby. Of course, Yellowstone is the heart of the National Parks with Old Faithful and an abundance of wildlife. Truly a great family western vacation.

HOTEL ACCOMMODATIONS:

Set 1,000 feet above the town of Jackson is **Spring Creek Ranch**, with its spectacular views of the Teton Mountain range. This Resort offers an outdoor swimming pool, the four-star Granary Restaurant, tennis, and a combination of hotel rooms, all with fireplaces. **Hotel rating: AAA 4-Diamond.**

GROUP BASE HOTEL PACKAGE:

- 7 days/6 nights: Harvest Dance or Sitting Suites: \$1,463 per person based on double occupancy including hotel taxes and resort fee.
- Package excludes the cost of conference fee.

Jul 23	Thu	Arrival 6:30 - 7:00pm	Hospitality Desk - Welcome to Jackson Hole Orientation Meeting
Jul 24	Fri	7:30am-12:50pm 6:00pm- 7:00pm	Income Tax, Public Benefits, and Estate/Lifetime Planning for Families - Part 1 CPE Hours: 6 Group Live - Taxes* Reception hosted by NTI
Jul 25	Sat	7:30am-12:50pm	Income Tax, Public Benefits, and Estate/Lifetime Planning for Families - Part 2 CPE Hours: 6 Group Live - Taxes*
Jul 26	Sun	Day of leisure	No meeting scheduled
Jul 27	Mon	7:30am-12:50pm	Individual Tax Update - 2020 CPE Hours: 6 Group Live - Taxes*
Jul 28	Tue	7:30am-12:50pm	Business Tax Developments - 2020 CPE Hours: 6 Group Live - Taxes*
Jul 29	Wed		Recommended day of departure

Suggested Activities for You and Your Family:

- Grand Teton National Park • Mountain Climbing • Hiking • Aerial Tram • Alpine Slide • Glider Rides • Hot Air Ballooning
- Wildlife Expedition • Scenic Float Trips • White Water Float Trips • Mountain Biking • Shopping • Fly Fishing • Trail Rides
- Golf • Tennis

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THE CLOISTER, SEA ISLAND, GA

AUGUST 2-8

Located off the coast of Southern Georgia, Sea Island is like your own private tropical island.

Here, peace, quiet, and privacy meet with an abundance of activities, all embraced with Southern hospitality, world-class golf, tennis, and miles of uninterrupted immaculate sandy beaches and lush tropical landscapes. The Cloister’s “country club” ambiance offers you total exclusivity and gracious Southern hospitality, while providing you with all the amenities of neighboring St. Simons Island – just a convenient five-minute drive away where you’ll find three golf courses, restaurants, and several specialty shops.

HOTEL ACCOMMODATIONS:

The Cloister is one of the East Coast’s finest resorts. Set on five miles of private beach, the resort offers in-shore (creek side) and on-shore fishing, kayaking, tennis, ballroom dancing lessons, skeet shooting school, formal main dining room, three restaurants, and the elegant Cloisters Spa.

Hotel Rating: AAA 5-Diamond.

GROUP BASE HOTEL PACKAGE:

- 7 days/6 nights: Cloister Garden Wing - \$1,877 per person, double occupancy, including hotel taxes and gratuity.
- Upgrades: Ocean View Beach Club and Cloister River View One Bedroom Suite, limited availability, please ask for details.
- Package excludes the cost of conference fee.

Aug 2	Sun	Arrival 6:30 - 7:00pm	Hospitality Desk - Welcome to The Cloister Orientation Meeting
Aug 3	Mon	7:30am-12:50pm 6:00pm-7:00pm	Individual Tax Update - 2020 CPE Hours: 6 Group Live - Taxes* Reception hosted by NTI
Aug 4	Tue	7:30am-12:50pm 9:00am-10:00am	Business Tax Developments - 2020 CPE Hours: 6 Group Live - Taxes* Spouse/Guest Breakfast
Aug 5	Wed	Day of leisure	No meeting scheduled
Aug 6	Thu	7:30am-12:50pm	2020 Estate, Gift, Benefits and Retirement Planning Update- Part 1 CPE Hours: 6 Group Live - Taxes*
Aug 7	Fri	7:30am-12:50pm	2020 Estate, Gift, Benefits and Retirement Planning Update- Part 2 CPE Hours: 6 Group Live - Taxes*
Aug 8	Sat		Recommended day of departure

Suggested Activities for You and Your Family:

- On-and off-shore Boating and Fishing • Three Championship Golf courses • relax at the Cloister’s five mile private beach • Camp Cloisters and Family Activities • Horseback riding on the beach • tennis at the Cloisters Tennis Center • The Cloister Spa • Ballroom Dancing Lessons • Nature Tours • Shooting School

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BERKSHIRES-TANGLEWOOD, LENOX, MA

JULY 26-31

Centrally located in the Berkshires region, **Lenox** attracts thousands of visitors each year, with its quaint award-winning restaurants, the summer home of the **Boston Symphony Orchestra** at Tanglewood, numerous theatre, both classical and contemporary music, the Norman Rockwell Museum, shopping and antique galleries, and more.

HOTEL ACCOMMODATIONS:

Wyndhurst Manor & Club is located in the heart of the Berkshires, in Lenox, Massachusetts. Situated on 380 rolling acres surrounded by beautiful views, Wyndhurst Manor & Club has become the Berkshires' Premiere Four-Season Resort. Each of their oversized rooms is individually decorated, and the newly renovated rooms will feature balconies, Jacuzzis and beautiful views of the surrounding Berkshire Hills. The 18-hole championship golf course is laid out perfectly throughout the grounds, challenging even the best of golfers. Artwork tells the history of not only this historic property, but the rich history of the surrounding area. **Hotel Rating: AAA 4-Diamond.**

GROUP BASE HOTEL PACKAGE:

- 6 days/5 nights: Run of House: \$1,325 per person, double occupancy, including taxes and resort fee.
- Upgrades: Junior Suites, limited availability, please ask for details.
- Package excludes the cost of conference fee and tours.

Jul 26	Sun	Arrival 6:30 - 7:00pm	Hospitality Desk - Welcome to Berkshires Orientation Meeting
Jul 27	Mon	7:30am-12:50pm 6:00pm - 7:00pm	Individual Tax Update - 2020 CPE Hours: 6 Group Live - Taxes* Reception hosted by NTI
Jul 28	Tue	7:30am-12:50pm	Business Tax Developments - 2020 CPE Hours: 6 Group Live - Taxes*
Jul 29	Wed	Day of leisure	No meeting scheduled
Jul 30	Thu	7:30am-12:50pm	Income Tax, Public Benefits, and Estate/Lifetime Planning for Families- Part 1 CPE Hours: 6 Group Live - Taxes*
Jul 31	Fri	7:30am-12:50pm	Income Tax, Public Benefits, and Estate/Lifetime Planning for Families- Part 2 CPE Hours: 6 Group Live - Taxes* Recommended day of departure

Suggested Activities for You and Your Family:

- Norman Rockwell Museum • Boston Symphony Orchestra at Tanglewood • Edith Wharton Home and Garden • Berkshire Theatre Group • Shakespeare & Company • Visit antique shops

***Note:** Continental breakfast will be served in the meeting room starting at 7:00am for participants only. Participants receive 6 CPEs for attending each live session and can receive additional CPEs (equal to the number of CPEs purchased) by completing optional self-study courses. Self-study materials will be available in modules of 2 CPEs and 4 CPEs (taxation and A&A) and will be distributed either by an on-line downloadable PDF format or distributed at the conference in manual format, at the customer's option. Summary of CPEs available at this program: Live Group study= 24 CPEs; Self-Study=16 CPEs for a total of 40 CPEs.

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SORRENTO, AMALFI COAST, ITALY

AUGUST 23-30

Sorrento is a small town wonderfully located on the Amalfi Coast over white steep cliffs and offers a fantastic view over the Bay of Naples. It lies on a Tufa terrace along the Coast of the beautiful Sorrentine Peninsula and is enclosed by impressive rocks of the limestone mountains.

HOTEL ACCOMMODATIONS:

Sorrento Palace is an exclusive hotel offering views of the Bay of Naples and the city of Sorrento. The hotel offers an enchanting setting that showcases bright and modern rooms and suites, outdoor swimming pools, an indoor pool and citrus garden. Settimo Club Lounge features a terrace and the infinity rooftop pool.

GROUP BASE HOTEL PACKAGE:

- 7 nights hotel accommodations, King Executive Sea View Room Package \$2,888 per person, double occupancy including hotel value added tax (VAT) and city taxes.
- Package includes: daily American breakfast, one dinner, welcome reception, two lunches, and walking tour.
- Package excludes the cost of conference fees.

Aug 23	Sun	Arrival 6:30 - 7:00pm	Hospitality Desk - Welcome to Sorrento Orientation Meeting No Meeting Scheduled
Aug 24	Mon	Day of Leisure Evening	Morning Tour: Walking tour of Sorrento Welcome Reception followed by 8:00pm dinner at the Sorrento Palace Hotel-hosted by NTI
Aug 25	Tue	7:30am-12:50pm 2:00pm-7:00pm	2020 Estate, Gift, Benefits and Retirement Planning Update- Part 1 CPE Hours: 6 Group Live - Taxes* Afternoon Tour TBD
Aug 26	Wed	7:30am-12:50pm	Individual Tax Update - 2020 CPE Hours: 6 Group Live - Taxes*
Aug 27	Thu	Day of leisure	No meeting scheduled Full Day Tour: TBD
Aug 28	Fri	7:30am-12:50pm 2:00pm-7:00pm	2020 Estate, Gift, Benefits and Retirement Planning Update- Part 2 CPE Hours: 6 Group Live - Taxes* Afternoon Tour TBD
Aug 29	Sat	7:30am-12:50pm	Business Tax Developments -2020 CPE Hours: 6 Group Live - Taxes*
Aug 30	Sun		Recommended day of departure

Suggested Activities for You and Your Family:

- Pompeii and the Herculaneum ruin • Amalfi Coast with the towns of Positano, Ravello and Amalfi • The charm of Capri • Naples cultural riches
- The Royal Palace of Caserta

***Note:** American Breakfast will be served in the hotel's main dining room starting at 7:00am for participants. Participants receive 6 CPEs for attending each live session and can receive additional CPEs (equal to the number of CPEs purchased) by completing optional self-study courses. Self-study materials will be available in modules of 2 CPEs and 4 CPEs (taxation and A&A) and will be distributed by an on-line downloadable PDF format. Summary of CPEs available at this program: Live Group study= 24 CPEs; Self-Study=16 CPEs for a total of 40 CPEs.

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BOCA RATON, FLORIDA OCTOBER 25-31

Boca Raton, Florida has everything you're looking for in a vacation destination: white sandy beaches, intracoastal waterways, and a downtown area with lots to do. With a great year-round climate, and its proximity to sandy ocean beaches and waterways, Boca Raton offers a wide array of leisure activities for everyone to enjoy including golf, tennis, boating, deep-sea fishing, shopping and more. Within a short drive from downtown Boca Raton, you will find a variety of restaurants and entertainment, including performing arts venues and museums.

HOTEL ACCOMMODATIONS:

Nestled on 356 picturesque acres in South Florida, **Boca Raton Resort & Club**, The Waldorf Astoria Collection® has reigned as an icon of elegance for more than 80 years. Today, this sprawling landscape of lush gardens and magnificent Mediterranean-style architecture has a fresh new look and modern amenities. Featuring: world class restaurants; the renowned luxury Palazzo Spa; two challenging 18-hole championship golf courses; 30-world-class tennis courts; half mile private beach; seven swimming pools, full service luxury marina and much more! **Hotel Rating: AAA 4-Diamond.**

GROUP BASE HOTEL PACKAGE:

- 7 days/6 nights: Tower Waterway: \$993 per person, double occupancy, including room tax and resort fee.
- Upgrade to Waterway Upper Floors and Beach Cub Ocean Vista, please ask for details.
- Package excludes the cost of conference fee.

Oct 25	Sun	Arrival 6:30 - 7:00pm	Hospitality Desk - Welcome to Boca Raton Orientation Meeting
Oct 26	Mon	7:30am-12:50pm 6:00pm-7:00pm	Individual Tax Update - 2020 CPE Hours: 6 Group Live - Taxes* Reception hosted by NTI
Oct 27	Tue	7:30am-12:50pm	Business Tax Developments - 2020 CPE Hours: 6 Group Live - Taxes*
Oct 28	Wed	Day of leisure	No meeting scheduled
Oct 29	Thu	7:30am-12:50pm	2020 Estate, Gift, Benefits and Retirement Planning Update- Part 1 CPE Hours: 6 Group Live - Taxes*
Oct 30	Fri	7:30am-12:50pm	2020 Estate, Gift, Benefits and Retirement Planning Update- Part 2 CPE Hours: 6 Group Live - Taxes*
Oct 31	Sat		Recommended day of departure

Suggested Activities for You and Your Family:

• Mizner Park Shopping complex • Boca Raton Museum of Art • Deer Creek Golf Club • Spanish River Park • Old Floresta District • Loxahatchee National Wildlife Refuge • Morikami Museum and Japanese Gardens • Old School Square Cultural Center • Center for the Arts at Mizner Park • South Beach Park • Boca Raton Old Town Hall

***Note:** Continental breakfast will be served in the meeting room starting at 7:00am for participants only. Participants receive 6 CPEs for attending each live session and can receive additional CPEs (equal to the number of CPEs purchased) by completing optional self-study courses. Self-study materials will be available in modules of 2 CPEs and 4 CPEs (taxation and A&A) and will be distributed either by an on-line downloadable PDF format or distributed at the conference in manual format, at the customer's option. Summary of CPEs available at this program: Live Group study= 24 CPEs; Self-Study=16 CPEs for a total of 40 CPEs.

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NOVEMBER 8-15

ARUBA, CARIBBEAN

Located in the Southern Caribbean, **Aruba** has been blessed with miles of pristine ivory beach and clear azure water. Aruba's trademark "Divi" trees dot the island landscape, while year-round sunshine and cooling trade winds make it a paradise haven. From exquisite dining experiences, world-class shopping, a myriad of sports and activities, exciting nightlife, dazzling shows, and casino gambling to historic landmarks and museums — all are enjoyed on the magnificent island of Aruba. Bon Bini!

HOTEL ACCOMMODATIONS:

Welcome to **The Ritz-Carlton Aruba**. With its Ritz-Carlton pedigree, an exclusive location on the island's famed Palm Beach and remarkable offerings of dining, wellness and recreation, the Ritz-Carlton Aruba ushers in a new and highly valued vacation experience to the Caribbean. To an island renowned for its pristine beaches and beautiful landscape, experience a new standard of luxury and elegance in accommodations, facilities, activities and services that ranks among the finest resorts worldwide. **Hotel rating: AAA 4-Diamond.**

GROUP BASE HOTEL PACKAGE:

- 8 days/7 nights: Ocean View - Run of House: \$1,846 per person based on double occupancy including hotel taxes.
- Upgrades to Ocean Front and Club Ocean Front Executive Suite, limited availability, please ask for details.
- Package excludes the cost of the conference fees.

Nov 8	Sun	Arrival 6:30pm-7:00pm	Hospitality Desk - Welcome to Aruba Orientation Meeting
Nov 9	Mon	7:30am-12:50pm 6:00pm-7:00pm	2020 Estate, Gift, Benefits and Retirement Planning Update- Part 1 CPE Hours: 6 Group Live - Taxes* Reception
Nov 10	Tue	7:30am-12:50pm 9:00am-10:00am	Individual Tax Update - 2020 CPE Hours: 6 Group Live - Taxes* Spouse/Guest Breakfast
Nov 11	Wed	Day of leisure	No meeting scheduled
Nov 12	Thu	Day of leisure	No meeting scheduled
Nov 13	Fri	7:30am-12:50pm	Business Tax Developments -2020 CPE Hours: 6 Group Live - Taxes*
Nov 14	Sat	7:30am-12:50pm	2020 Estate, Gift, Benefits and Retirement Planning Update- Part 2 CPE Hours: 6 Group Live - Taxes*
Nov 15	Sun		Recommended day of departure

Suggested Activities for You and Your Family:

- Natural Bridge • Duty-free shopping in Oranjestad, Aruba's capital • Scuba Diving • Atlantis Submarine Tours • Off-road Aruba Safaris • California Lighthouse • Snorkeling • Aruba Historical Museum • Golf • Horseback riding on the beach • Glass Bottom Boat Cruise • Day trip to De Palm Island • Deep Sea Fishing • Island Tours • Arikok National Park • Casinos • Sunset Dinner Cruises • The Butterfly Farm • Aruba's natural Caves

***Note:** Continental breakfast will be served in the meeting room starting at 7:00am for participants only. Participants receive 6 CPEs for attending each live session and can receive additional CPEs (equal to the number of CPEs purchased) by completing optional self-study courses. Self-study materials will be available in modules of 2 CPEs and 4 CPEs (taxation and A&A) and will be distributed either by an on-line downloadable PDF format or distributed at the conference in manual format, at the customer's option. Summary of CPEs available at this program: Live Group study= 24 CPEs; Self-Study=16 CPEs for a total of 40 CPEs.

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MAUI, HAWAII NOVEMBER 29 - DECEMBER 6

Surrounded by championship golf courses, mountains, pineapple fields and blessed with white sand beaches, the **Hawaiian Island of Maui's** diversity is revealed around every bend and beyond every rainbow. Drive up to the moon-like crater at the summit of Haleakala or bicycle down the summit for dramatic views. Travel the winding road to Hana, past waterfalls and tropical forests and explore the historic whaling town of Lahaina. Maui's natural wonders never cease.

HOTEL ACCOMMODATIONS:

Overlooking the gentle waters of Wailea Beach, is the luxurious **Four Seasons Resort Maui**, with its ever-attentive hotel staff and the largest luxury resort guest rooms and suites on the island, epitomizes a classical Hawaiian palace resort. On the sunny side of Maui island, graced with near-perfect weather, Four Seasons Resort Maui rises like a classical Hawaiian palace on the golden crescent of Wailea Beach. The resort is designed with angled guest rooms to give as many rooms as possible an ocean view. A stroll through fragrant plumeria trees and art-laden public areas reveals a study in elegance. **Hotel Rating: AAA 5-Diamond**

GROUP BASE HOTEL PACKAGE:

- 8 days/7 nights: Garden View \$2,198 per person, double occupancy, including taxes.
- Upgrades to Ocean View, limited availability, please ask for details.
- Package excludes the cost of conference fee.

Nov 29	Sun	Arrival 6:30pm - 7:00pm	Hospitality Desk - Welcome to Maui Orientation Meeting
Nov 30	Mon	7:30am-12:50pm 6:00pm-7:00pm	2020 Estate, Gift, Benefits and Retirement Planning Update- Part 1 CPE Hours: 6 Group Live - Taxes* Reception hosted by NTI
Dec 1	Tue	7:30am-12:50pm 9:00am-10:00am	Individual Tax Update - 2020 CPE Hours: 6 Group Live - Taxes* Spouse/Guest Breakfast
Dec 2	Wed	Day of leisure	Day of leisure - No meeting scheduled
Dec 3	Thu	Day of leisure	Day of leisure - No meeting scheduled
Dec 4	Fri	7:30am-12:50pm	2020 Estate, Gift, Benefits and Retirement Planning Update- Part 2 CPE Hours: 6 Group Live - Taxes*
Dec 5	Sat	7:30am-12:50pm	Business Tax Developments -2020 CPE Hours: 6 Group Live - Taxes*
Dec 6	Sun		Recommended day of departure

Suggested Activities for You and Your Family:

- Town of Lahaina • "Road to Hana" • Baldwin Home Museum • Hawaii Experience and Domed Theater • Atlantis Submarine • Kahului
- Maui Tropical Plantation • Whaler's Village • Maui Myth & Magic Theatre • Golf • Haleakala National Park • Maui Ocean Center • Pacific Whale Foundation • Hawaii Nature Center • Bailey House Museum

***Note:** Continental breakfast will be served in the meeting room starting at 7:00am for participants only. Participants receive 6 CPEs for attending each live session and can receive additional CPEs (equal to the number of CPEs purchased) by completing optional self-study courses. Self-study materials will be available in modules of 2 CPEs and 4 CPEs (taxation and A&A) and will be distributed either by an on-line downloadable PDF format or distributed at the conference in manual format, at the customer's option. Summary of CPEs available at this program: Live Group study= 24 CPEs; Self-Study=16 CPEs for a total of 40 CPEs.

For conference registration or information: **888-515-3674 Ext 1** fax: 888-552-9749



REGISTRATION

CONFERENCE & HOTEL

Cost includes all materials, continental breakfast at each meeting (for participants only), and a cocktail reception for you and your spouse/guests.

**Group discounts: 10% for 3 or more registrants.
20% for 5 or more registrants.**

Conference Cancellation Policy: Conference fee will be refunded in full only if notice is received in writing at least 90 days prior to the first day of the conference. With respect to a cancellation occurring within 90 days, no refund shall be granted but credit will be given toward a future conference. This policy applies to the conference fee only and not to hotel costs. For more information regarding concerns and administrative policies, please go to our website: www.nticpe.com or contact our office at 888-515-3674 [Extension 1].

Hotel Cancellation Policy: Refunds for hotel cancellations will be made, less a \$100 per person administrative fee, if cancellation is made in writing on or before 90 days prior to the beginning of the conference. For cancellations within 90 days, any portion of the hotel package cost not refunded by the hotel to NTI will be deducted from the refund. Any cancellations must be made in writing and emailed to conferences@nticpe.com or faxed to 888-552-9749. Italy Cancellation Policy: Please see dossier.

How to Register:

888-515-3674 Ext 1 or fax 888-552-9749 and register by credit card (MasterCard/VISA)

Return this registration form to the address at the bottom of the page with TWO CHECKS:

1. For conference cost: Make check payable to: **NTI**
2. Deposit for hotel package: Make check payable to: **NTI for \$300 per person** (Italy deposits vary).

CPE Pricing	24CPEs	32CPEs	40CPEs
By January 31, 2020	\$1,597	\$1,648	\$1,699
By May 31, 2020	\$1,697	\$1,748	\$1,799
After May 31, 2020	\$1,797	\$1,848	\$1,899
Italy: Add \$100			

Location	Date	Please check	Hotel package*
Santa Barbara, CA	Jun 22-28	<input type="checkbox"/> 6 nts	\$1,472
Jackson Hole, WY	Jul 23-29	<input type="checkbox"/> 6 nts	\$1,463
Sea Island, GA	Aug 2-8	<input type="checkbox"/> 6 nts	\$1,877
Berkshires Lenox, MA	Jul 26-31	<input type="checkbox"/> 5 nts	\$1,325
Sorrento, Italy	Aug 23-30	<input type="checkbox"/> 7 nts	\$2,888

Location	Date	Please check	Hotel package*
Boca Raton, FL	Oct 25-31	<input type="checkbox"/> 6 nts	\$993
Aruba, Caribbean	Nov 8-15	<input type="checkbox"/> 7 nts	\$1,846
Maui, Hawaii	Nov 29-Dec 6	<input type="checkbox"/> 7 nts	\$2,198

*Rates are per person, double occupancy. Room rates, taxes and gratuities are subject to change.
Prices subject to change based on availability at the time of booking. Upgrades available at surcharge. Not responsible for errors or omissions.

Registration Form:

Name _____ Spouse/Companion _____

Address _____ City _____ State _____ Zip _____

Telephone _____ Facsimile _____ E-mail _____

Conference cost: 24 CPEs \$ _____ 32 CPEs \$ _____ 40 CPEs \$ _____

Conference days: (Please list the days and topics that you are attending)

Date _____ Topic _____

Date _____ Topic _____

Date _____ Topic _____

Date _____ Topic _____

\$ _____ Conference fee: Make check payable to: NTI

\$ _____ Hotel deposit: **\$300 per person** (for Italy, ask for details). Make check payable to: **NTI**

Charge my: MasterCard VISA

Card number _____ Expiration date _____ CWV Code _____ Signature _____

State in which CPE is required _____ I am a: CPA PA EA (PTIN _____) Attorney CFP Other

I work in: Public Accounting Industry Other

To register:

Call **888-515-3674, Extension 1 or**

Complete this form and send it as follows:

Mail: NTI Conference Registration, PO Box 375, Burlington, Massachusetts 01803

Fax: 888-552-9749

Email to: conferences@nticpe.com

For conference registration or information: **888-515-3674 Ext 1** fax: 888-552-9749

Choose from 2 Self-Study options.



Option 1: Purchase Individual Courses

OR

Option 2: Purchase Unlimited CPE

Option 1: Purchase Individual Courses

There are two versions of each course:

- Paper/Manual Format - Sent By Mail
- Electronic Format - Sent to you via email in PDF format

Please see course listing on page 18 and purchase individual courses through our on-line cart

Option 2: Purchase Unlimited CPE

Unlimited CPE allows you to download as many courses as you want for one low price within a 12-month period from the date of purchase:

- 21 Courses available for download in PDF format upon purchase **(SEE COURSE LISTING ON PAGE 18)**.
- 285 hours in taxation, 126 hours in accounting and auditing.
- Upon purchase, you will receive a private LOGIN password giving you access to all the courses available for download.

Special multiple-user and firm discounts.

The unlimited CPE option is available for all size firms, ranging from a single user to larger firm use.

For course descriptions, objectives and field of study details on these courses, please visit our web site: www.nticpe.com and select the self-study section.

Special Offers:

Buy **two** courses, receive the **third course FREE***

OR

Buy **three** courses, receive **two FREE***

*Free course is based on the purchased course with the least number of CPE credits

Unlimited CPE

Download as many courses as you need for one low price**

**Unlimited CPE applies for one year from the date of purchase

UNLIMITED CPE PRICING

Firm Size	Item #	Price
1	80	\$399
2	80A	\$599
3	80B	\$749
4-10	80C	\$999
11-20	80D	\$1,099
21-30	80E	\$1,599
31-50	80F	\$1,999

Note: Prices above provide the purchaser(s) with unlimited CPE downloads during the 12-month period after date of purchase.

For self-study registration or information: **888-515-3674 Ext 2**

fax: 888-552-9749

www.nticpe.com

e-mail: selfstudy@nticpe.com

Course Offering

Taxation

Field of Study: Taxes

Prerequisite: General understanding of federal taxation

Advanced Preparation: None

Format: Manual with exam

Level: Overview

CPE: 8 – 40 CPEs as noted, based on 50-minutes per CPE hour measurement

BUSINESS TAXATION

Item 600: 24 CPEs \$249

Paper/Manual Format: Item 600: 24 CPEs \$249

Emailed PDF: Item 600-E: 24 CPEs \$179

COMPLETE GUIDE TO ESTATE AND GIFT TAXATION

Paper/Manual Format: Item 101: 35 CPEs \$349

Emailed PDF: Item 101-E: 35 CPEs \$269

TAX, BANKRUPTCY AND FINANCIAL PROBLEMS

Paper/Manual Format: Item 12: 19 CPEs \$219

Emailed PDF: Item 12-E: 19 CPEs \$149

DEFENSIVE DIVORCE

Paper/Manual Format: Item 620: 16 CPEs \$199

Emailed PDF: Item 620-E: 16 CPEs \$129

ASSET PROTECTION STRATEGIES FOR ACCOUNTANTS

Paper/Manual Format: Item 19: 18 CPEs \$199

Emailed PDF: Item 19-E: 18 CPEs \$129

CORPORATE TAX PLANNING

Paper/Manual Format: Item 511: 21 CPEs \$249

Emailed PDF: Item 511-E: 21 CPEs \$179

FAMILY TAX PLANNING

Paper/Manual Format: Item 70: 24 CPEs \$249

Emailed PDF: Item 70-E: 24 CPEs \$179

CHOICE OF ENTITY **NEW**

Paper/Manual Format: Item 610: 22 CPEs \$249

Emailed PDF: Item 610-E: 22 CPEs \$179

SPECIAL PROBLEMS IN REAL ESTATE TAXATION

Paper/Manual Format: Item 22: 11 CPEs \$169

Emailed PDF: Item 22-E: 11 CPEs \$109

FAST TRACK RETIREMENT PLANNING **NEW**

Paper/Manual Format: Item 23: 17 CPEs \$199

Emailed PDF: Item 23-E: 17 CPEs \$129

ASSETS, INCOME AND CASH **NEW**

Paper/Manual Format: Item 630: 14 CPEs \$199

Emailed PDF: Item 630-E: 14 CPEs \$129

1040 WORKSHOP

Paper/Manual Format: Item 11: 29 CPEs \$299

Emailed PDF: Item 11-E: 29 CPEs \$229

GUIDE TO FEDERAL CORPORATE AND INDIVIDUAL TAXATION

Paper/Manual Format: Item 102: 35 CPEs \$349

Emailed PDF: Item 102-E: 35 CPEs \$269

**Buy Two, Get Third Free
Buy Three, Get the
Next Two Free!**

Accounting and Auditing

Field of Study: Accounting and Auditing

Prerequisite: Basic understanding of accounting and auditing

Advanced Preparation: None

Format: Manual with exam

Level: Overview CPE: 8 – 40 CPEs as noted, based on 50-minutes per CPE hour measurement

SSARS No. 21 - 24

New Compilation and Review Standards

Paper/Manual Format: Item 32: 10 CPEs \$139

Emailed PDF: Item 32-E: 10 CPEs \$99

2020 FASB REVIEW **BEST SELLER!**

Paper/Manual Format: Item 30: 16 CPEs \$199

Emailed PDF: Item 30-E: 16 CPEs \$129

CURRENT DEVELOPMENTS — ACCOUNTING AND FINANCIAL REPORTING 2020

Paper/Manual Format: Item 6: 16 CPEs \$199

Emailed PDF: Item 6-E: 16 CPEs \$129

PRACTICE ISSUES - COMPILATION AND REVIEW UPDATE **BEST SELLER!**

Paper/Manual Format: Item 31: 20 CPEs \$219

Emailed PDF: Item 31-E: 20 CPEs \$149

EVERYTHING YOU NEVER WANTED TO KNOW ABOUT GAAP

Paper/Manual Format: Item 33: 16 CPEs \$199

Emailed PDF: Item 33-E: 16 CPEs \$129

2020 FASB, SSARS AND SAS UPDATE AND REVIEW **BEST SELLER!**

Paper/Manual Format: Item 29: 24 CPEs

(Accounting: 12, Auditing: 12) \$249

Emailed PDF: Item 29-E: 24 CPEs

(Accounting: 12, Auditing: 12) \$179

AUDITING DEVELOPMENTS 2020

Paper/Manual Format: Item 20: 16 CPEs \$199

Emailed PDF: Item 20-E: 16 CPEs \$129

MAJOR CHANGES TO AUDITING STANDARDS UNDER THE ASB'S CLARITY PROJECT SAS NOS. 122-132

Paper/Manual Format: Item 500: 8 CPEs \$139

Emailed PDF: Item 500-E: 8 CPEs \$89

For complete course descriptions and to purchase online, visit www.nticpe.com

For self-study registration or information: **888-515-3674 Ext 2** fax: 888-552-9749

SELF-STUDY ORDER FORM

Mail this form to: NTI, Self-Study Division, PO Box 375, Burlington, MA 01803

Quantity	Item #	Course Title	Price	Total Price
		3rd course		FREE
		4th course		
		5th course		FREE
		Extra Exams:		
		Unlimited CPE		

Shipping Costs for Paper/Manual format only:				
Quantity	Ground	3-Day Select	2nd Day	Rush/Next Day
1	\$23.00	\$29.00	\$35.00	\$50.00
2	\$26.00	\$30.00	\$45.00	\$58.00
3	\$29.00	\$42.00	\$52.00	\$72.00
4	\$32.00	\$47.00	\$54.00	\$79.00
5	\$33.00	\$57.00	\$67.00	\$97.00

More than 5, please ask for cost.

Subtotal _____
 Shipping: UPS _____
(see chart)
 Total _____

Form of Payment

- Check enclosed (Please make payable to NTI)
 Charge my: MasterCard VISA

Self-study courses may be returned for a full refund provided the products are returned intact, without damage, within 60 days of purchase.

Card number _____ Expiration date _____ CWV/CVC Code _____

Name _____ Title _____

Firm/Company _____ Address _____

City _____ State _____ Zip _____

Telephone _____ Facsimile _____ E-mail _____

State in which CPE is required _____ I am a: CPA PA EA (PTIN _____) Attorney CFP Other

I work in: Public Accounting Industry Other

Signature _____

Self-study program cancellation policy: It is NTI's policy not to cancel a self-study course unless such courses become outdated. In the unlikely event that due to unforeseen circumstances, NTI must cancel a self-study course, you will be notified and will have the opportunity to select another course if you have ordered the cancelled course and it has not been shipped to you. Any courses cancelled that have already been shipped to you may be completed by you and NTI will accept the completed examination for grading within the required one-year from purchase time limitation.

Complaint resolution: All questions and complaints regarding any self-study course or conference should be submitted to the attention of Director of NTI sending an email to: director@nticpe.com.

NTI (Novel Training Ideas) is a division of Fustolo CPE LLC.

For self-study registration or information: **888-515-3674 Ext 2** fax: 888-552-9749

www.nticpe.com

e-mail: selfstudy@nticpe.com



- Conferences
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