



Conference Fee  
Discount By  
February 15, 2026

# **NTI 2026 GRAND CAYMAN CONFERENCE**

***GRAND HYATT GRAND CAYMAN RESORT & SPA***  
**Grand Cayman**  
**November 8-15, 2026**



**NTI 2026 CONFERENCE PROGRAM  
GRAND HYATT GRAND CAYMAN RESORT & SPA  
GRAND CAYMAN  
NOVEMBER 8-15, 2026**

- Location:** **Grand Hyatt Grand Cayman Resort & Spa**  
89 West Bay Road, Grand Cayman KY1-9006 Cayman Islands  
Phone: 1-(345) 945-3800. Visit: [www.hyatt.com/grand-hyatt](http://www.hyatt.com/grand-hyatt)
- Airport:** Owen Roberts International (GMC0 Hotel direction: 4 Miles)
- Transfers:** Taxi service is available outside the baggage area at the airport. Cost is approximately \$30-\$35. Directions: Visit [ww.hyattgrandcayman.com](http://ww.hyattgrandcayman.com)
- Weather:** Average high 80 degrees; average low of 81 degrees with a median of 83 degrees.  
Area information: [www.caymanisland.ky](http://www.caymanisland.ky)
- Passport Info:** The U.S. State Department and the Department of Homeland Security state that all travelers entering or re-entering the U.S. from the Caribbean will be required to carry passport. For additional passport info visit: [www.travel.state.gov](http://www.travel.state.gov)

**GRAND HYATT GRAND CAYMAN RESORT & SPA– 8-Day-7-Night Package**

A world-class beach warrants a world-class stay, and that's exactly what awaits at **Grand Hyatt Grand Cayman Resort & Spa**. Ideally situated near Seven Mile Beach with opportunities for fun and relaxation abound. Inside the resort, their sumptuous spa soothes your body and mind, or lounge at one of their amazing pools, work out at the on-site fitness center, and view unrivaled ocean vistas and the largest space on the island. It's all there on 900 feet of spectacular oceanfront overlooking the Caribbean Sea and breathtaking sunset views.

**Check-in:** 3:00pm

**Check-Out:** 11:00am (Surcharges may apply for late checkouts)

**Hotel Rating:** Newly opened

**Parking:** Complimentary valet parking – Self-parking is not available

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EMAIL: [conferences@nticpe.com](mailto:conferences@nticpe.com)**



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**Accommodations:**

The vibrant energy and relaxed charm of Grand Cayman translated into the Hyatt's hotel rooms and suites featuring colorful, island-inspired décor and comfortable amenities.

All rooms feature: 55" and 65" HDTVs – Individual climate control – Blackout curtains – Complimentary Wi-Fi – Nespresso coffee maker – Bathrobes and slippers – Hair dryer – Iron and ironing board – In-room safe. Suite accommodations include a refrigerator and microwave.

**Oceanview with Balcony** (approximately 468 sq. ft.) Wake up to breathtaking ocean views, featuring king or 2 queen beds, a spa-style bathroom and private furnished balcony. **Rooms are third floor or higher.** Maximum: 4 persons.



**Oceanfront with Balcony:** (approximately 468 sq. ft.) Wake up to breathtaking direct oceanfront views, featuring king or 2 queen beds, a spa-style bathroom and private furnished balcony. **Rooms are third floor or higher** Maximum: 4 persons.

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**One-Bedroom Ocean Front Suite:** (approximately 874 sq. ft.) The furnished terrace of this oceanfront suite nearly doubles the living space of your Cayman retreat. Inside, the 936-square foot space features one bedroom with a king bed and spa-like bathroom, a living room with sleeper sofa, a dining room with table for six, a wet bar and an additional full bath – not the mention stunning view of the sea.



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**Hotel Package includes:**

- 7-night hotel accommodations
- All hotel room taxes, portage, maid service and resort fee.
- \$100 per room credit posted to the room to be used at the hotel's spa and food establishments.

**Resort fee** The hotel package includes a daily resort fee for the following complimentary items:

- Welcome drink upon arrival
- 24-hour fitness center – daily fitness activities
- Lounge chairs and towels at beach
- Valet parking
- Non-motorized watersports
- Jogging station with trail map and hydration station
- Bicycle usage
- Weekly entertainment

Extra Third/Fourth Person Charge: \$40/ nightly plus tax. Children 18 and under are complimentary when sharing with two paying adults using existing bedding. Extra nights and single rates: Please ask for details. **NO REFUNDS FOR EARLY DEPARTURES**

***Special Upgrade Price-  
Oceanfront Rooms and  
Oceanfront One-Bedroom Suites  
LIMITED AVAILABILITY***

**HOTEL PACKAGE COST-  
8 DAYS/7 NIGHTS  
(Nights of November 8-15, 2026  
Departure on November 16, 2026)**

<b><u>Room category</u></b>	<b>(Per Person) Double Occupancy <u>Package Cost**</u></b>
Ocean View with balcony	\$2,507
Ocean Front with balcony- <b>LIMITED AVAILABILITY</b>	\$2,944
One-Bedroom Ocean Front Suite- <b>ONE AVAILABLE</b>	*\$4,907

\*\* Total cost per room, multiply the package cost by 2.

**Note: Hotel package costs are subject to change without notice.**

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**HOTEL PACKAGE PAYMENT:**

With reservation:

**August 1, 2026**

\$500 per person (see reservation form below)

Balance due

**Hotel Cancellation:** Refunds for hotel cancellations will be made, **IN FULL**, if cancellation is made in writing **on or before August 1, 2026**. **No hotel refunds after August 1, 2026**. Any cancellations on or before August 1, 2026 must be made in writing and emailed to [conferences@nticpe.com](mailto:conferences@nticpe.com) or faxed to [888-552-9749](tel:888-552-9749). No refunds for early departures.



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### Hotel Amenities:

The hotel features a concierge, fitness center, Internet access, free parking, Camp Hyatt, laundry, valet parking, and a pet friendly environment. With three pools on-site, there are choices, whether a sport for the kids to play, the vitality pool in the spa for rejuvenation or the main pool for lounging, swimming or sipping a hand-crafted drink from their pool bar. Don't miss a workout at the hotel's fitness center while enjoying your seaside escape. The modern fitness center has the latest cardio and weight training equipment, plus plenty of space for yoga and more.

***Mera Elemental Spa:*** A sacred retreat for those seeking solace, balance and deep healing. Blending ancient wisdom with modern innovation, Mera offers transformative treatment therapies curated under seven sacred elements of healing, inviting you to explore wellness rituals that speak to your unique path. An immersive journey of self-discovery and renewal.

- Vitality Pool: A coed, outdoor, warm hydrotherapy experience with ocean views featuring loungers and targeted jets to soothe muscles.
- Bio Sauna: A soft sauna experience maintained at 70°C with 65% humidity, offering gentle thermal therapy to promote relaxation and circulation.
- Steam Rooms: Separate his and her aromatherapy detox zones with gentle heat and humidity to promote deep relaxation and purification.
- Hammam: A modern interpretation of a communal ancient cleansing ritual space featuring heated hydronic stone surfaces and gentle mist.

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**Restaurants and Lounges:**

Grand Hyatt Grand Cayman Resort & Spa provides diverse dining options from morning to night.

***Lo Tide/Pool Bar Restaurant*** -Enjoy Mexican-inspired drinks and snacks from your pool lounge chair or at their poolside bar and grill

***Hi Tide/Rooftop Bar*** – Meet for sunset viewing overlooking the pool and toast your Grand Cayman visit with a mezcal cocktail paired with an exclusive menu of raw and cured items.

***Lobby Bar*** – Grab a cocktail, share a bottle of wine and a bite, or sip a post-dinner libation in our sophisticated bar in the middle of the action

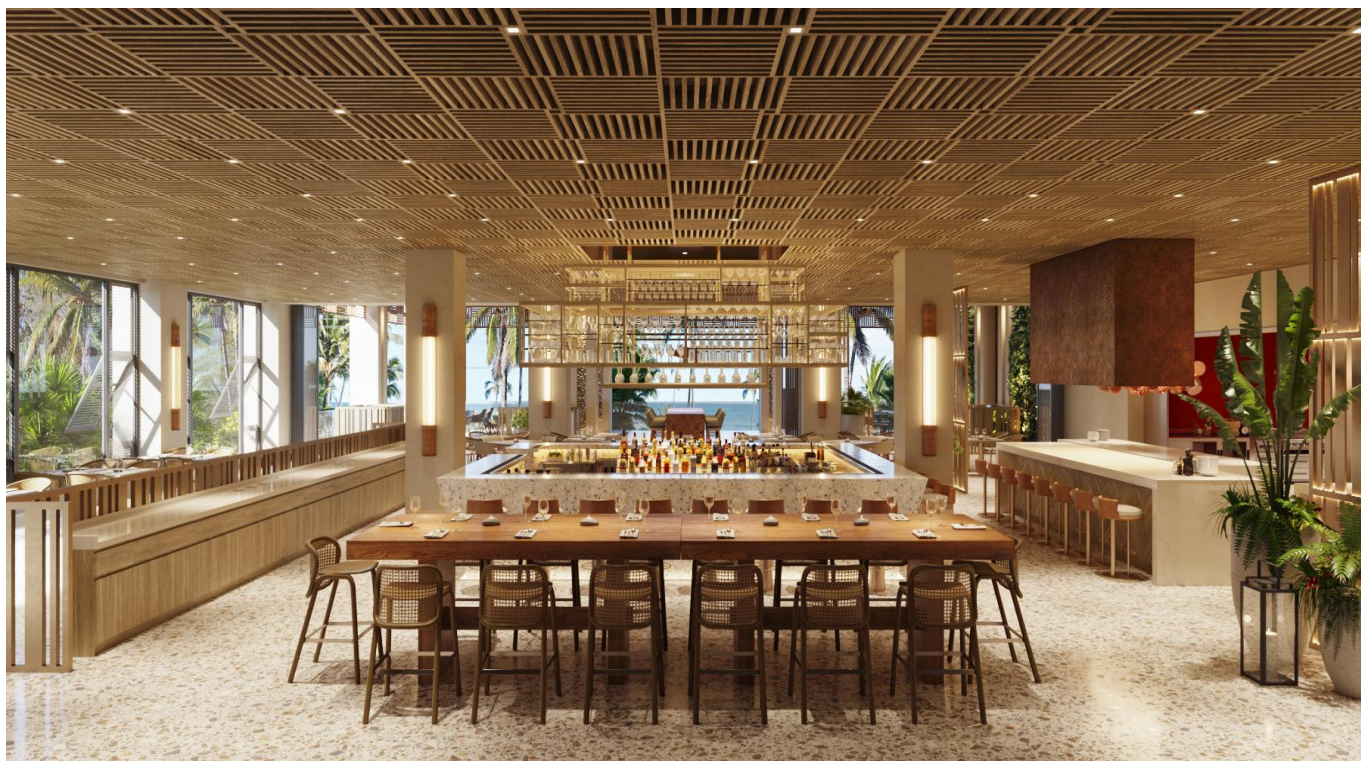
***Brasa*** – Discover local seafood and island-inspired cuisine in an elegant, full-service setting, plus clever cocktails and an extraordinary wine list for entertaining family, colleagues and friends.



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***Salt & Cinder*** – Order breakfast or weekend brunch or have lunch or dinner from the globally inspired menu in a space that provides the perfect setting for a casual meal or meeting



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**Grand Cayman:**

Nestled in the calm turquoise waters of the western Caribbean, lies the peaceful Cayman Islands. This island paradise offers spectacular natural beauty, a wealth of activities including an abundance of water sports and a vast amount of historical and ecological points of interest. Explore a sunken wreck, dance the night away, go duty-free shopping or explore the island – Cayman is the place to be.

***Suggested Activities:***

Duty-free shopping – Island Tour – Seven Mile Beach – Snorkel excursion – Stingray City – Sunset Sail – Turtle Farm – Scuba diving – Queen Elizabeth II Botanic Park – Butterfly Farm – Day trip to Cayman Brac or Little Cayman – Famous town of “Hell” – Excursion to Rum Point – Bird watching – Cayman Craft Market – Tennis – Pirate Cruise – Golf – Atlantis Deep Dive Submarine – Dining at any island restaurants.







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**NTI 2026 CONFERENCE SCHEDULE  
GRAND HYATT CAYMAN RESORT & SPA  
GRAND CAYMAN  
NOVEMBER 8-15, 2026**

<b>DATE</b>	<b>MEETINGS</b>	<b>SOCIAL EVENTS/TOURS</b>
<b>11/08 Sunday</b>	<b>Arrival</b> - no meeting scheduled	6:30-7:00pm: <b>Hospitality Desk Welcome to Grand Cayman Orientation Meeting</b>
<b>11/09 Monday</b>	7:30am-12:50pm meeting <b>2026 Individual Tax Update</b> <b>Speaker:</b> James D. Brandenburg, CPA, MST CPE Hours: 6 Group Live – Taxes	6:00 – 7:00pm: <b>Cocktail reception hosted by NTI</b>
<b>11/10 Tuesday</b>	7:30am-12:50pm meeting: <b>Business Tax Developments-2026</b> <b>Speaker:</b> James D. Brandenburg, CPA, MST CPE hours: 6 Group Live – Taxes	
<b>11/11 Wednesday</b>	<b>Day of leisure</b> – no meeting scheduled	
<b>11/12 Thursday</b>	<b>Day of leisure</b> – no meeting scheduled	
<b>11/13 Friday</b>	7:30am-12:50pm meeting: <b>Family Individual and Business Tax Planning</b> <b>Speaker:</b> Joy Matak, JD, LLM CPE hours: 6 Group Live – Taxes	
<b>11/14 Saturday</b>	7:30am-12:50pm meeting: <b>Creative IRA, Life Insurance and Retirement Planning Techniques</b> <b>Speaker:</b> Joy Matak, JD, LLM CPE hours: 6 Group Live – Taxes	
<b>11/15 Sunday</b>	<b>Recommended day of departure</b>	

**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.

**CPE BREAKOUT:**

Group live CPE (4 days at 6 CPEs per day)

24 CPE hours

Self-study supplement\*

16 CPE hours

Total CPE

40 CPE Hours

\*Distributed either on-site or in a downloadable PDF format

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**Who Should Attend:** CPAs and other professionals who deal in taxation.

**Details on courses:** Unless otherwise stated, all courses have the following attributes:

***Delivery method:*** The live segments of the program (6 CPE hours per session) are categorized as Group Live, while the self-study supplement (2 to 4 CPEs per session) is categorized as QAS Self Study.

***Program level:*** Update

***Prerequisites:*** General understanding of taxation (tax courses)

***Advance preparation:*** None

## TOPIC DESCRIPTIONS

**Includes Post-Passage Planning  
of the OBBBA of 2025**

### 2026 Individual Tax Update

***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 2026 tax developments related to individuals, including tax changes included in new IRS regulations and procedures. Topics include: including new IRS regulations and revenue procedures, practice planning areas, pending changes and tax reform, and more. Recommended CPEs: 6 hours. Field of study: Taxes

### Business Tax Developments- 2026

***Objective:*** To address recent developments related to the federal income taxation of businesses.

This course addresses tax issues related to businesses including key matters involving C corporations, S corporations, LLCs and partnerships. Topics include: a reassessment the choice of entity, recent regulations and guidance related to pass-through entities, planning for expiring tax provisions, pending changes and tax reform involving businesses, and more. Recommended CPEs: 6 hours. Field of study: Taxes

### Family Individual and Business Tax Planning

***Objective:*** To review tax planning opportunities for families and their businesses.

This course discusses the tax ramifications of the family united and apart. While the nuclear family remains the center point of society, today it is under tremendous economic and social pressure. This course is designed to cover “hot” tax and financial issues that affect our clients and their families.

Topics include: Tax planning for children including IRAs for children, advance use of life insurance for children, planning documents for colleges, and helping children make large purchases such as buying homes.

Planning issues for blended families and alternative lifestyles; Business succession planning for the family business including: getting the business ready for sale/transfer to the next generation, structuring buy-sell agreements, equal vs. equitable dispositions of family businesses and other assets among family members.

Unique planning opportunities for IRC 1202 stock and maximizing IRC 754 step up adjustments; Protecting the family business from the future in-law including pre-marital and post-marital agreements, spendthrift trust

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provisions, and divorce-peculiar transactions; Family philanthropy and charitable giving including a comparison of donor advised funds vs. private foundations; Family continuity issues following death of a member; Unraveling or modifying family trusts that don't work anymore; Intra-family loans and tax implications, and more. Recommended CPEs: 6 hours. Field of study: Taxes

### **Creative IRA, Life Insurance and Retirement Planning Techniques**

**Objective:** To review tax planning opportunities for IRAs and retirement planning.

We are all (including tax practitioners) getting older, and the need for effective retirement planning has never been greater. This course is essential for participants who wish to attain maximum value from effective tax planning for IRAs, life insurance and other retirement-related assets. Topics include: separated RMD and QCD planning techniques; planning for traditional and Roth IRAs including advanced Roth Conversion strategies, backdoor Roth IRA planning, and rollovers; Maximizing Roth contributions for children; use of self-directed IRAs; Mega Roth Contributions; incorporating longevity insurance and life insurance into a retirement plan; selling old life insurance policies, and more. Recommended CPEs: 6 hours. Field of study: Taxes

**ACCOUNTING AND AUDITING CPE:** If you need accounting and auditing credits, we offer numerous self-study courses that qualify for accounting and auditing credit hours.

## **SPEAKER BIOGRAPHIES:**

### **James D. Brandenburg, CPA, MST**

Partner with the national CPA firm of Sikich, with extensive experience and knowledge in corporate and partnership tax law, mergers and acquisitions and tax legislation. Mr. Brandenburg has particular expertise working with owners of closely held businesses to identify tax planning opportunities and assist them in implementing these strategies including tax planning and reporting for manufacturers, distributors and contractors, International tax consulting and compliance, LIFO inventory planning, analysis and implementation, Interest charge DISCs planning, analysis and reporting, and Foreign bank and investment account reporting and compliance, among others. He has also been a national lecturer on taxation to accountants and attorneys.

### **Joy Matak, JD, LLM**

Partner at Avelino Law, LLP in the firm's Private Client Services practice group. With over two decades of diversified experience as a wealth transfer strategist, Joy has an extensive background in recommending and implementing advantageous tax strategies for multigenerational wealth families, owners of closely held businesses, and high net worth individuals. Adept at navigating the intricate landscape of estate and business succession, Joy crafts customized wealth transfer strategy plans to accomplish even the most complicated estate and business succession goals. She also performs tax compliance work including gift tax, estate tax, and income tax returns for trusts and estates as well as consulting services related to transfer tax planning, asset protection, life insurance structuring, and post-mortem planning. A sought-after resource in her field, Joy frequently shares her insights through speaking engagements for the ABA Real Property, Trust and Estate Law Section; Wealth Management Magazine; the Estate Planning Council of Northern New Jersey; and the Society of Financial Service Professionals. Joy is a regular, monthly contributor to *Trusts & Estates* magazine and has authored and co-authored articles for the *Tax Management Estates, Gifts and Trusts (BNA) Journal*; Leimberg Information Services, Inc. (LISI); and *Estate Planning Review The CCH Journal*, among others, on a variety of topics including wealth transfer strategies, income taxation of trusts and estates, and business succession planning. Joy co-authored a book on the 2017 tax reforms entitled *Estate Planning: Estate, Tax and Other Planning after the Tax Cuts and Jobs Act of 2017*.



**Conference Fee  
Discount  
By February 15, 2026**

**CPE Pricing:**

	Up to 24 CPEs	Up to 32 CPEs	Up to 40 CPEs
<b>By February 15, 2026</b>	<b>\$2,197</b>	<b>\$2,298</b>	<b>\$2,399</b>
By June 30, 2026	\$2,297	\$2,398	\$2,499
After June 30, 2026	\$2,397	\$2,498	\$2,599

Cost includes all materials, continental breakfast at each session, (for participants only), and a sunset cocktail reception for you and your family.

Group discounts: 10% for 3 or more participants  
20% for 5 or more participants

**Conference Cancellation Policy:** Conference fee will be refunded in full only if notice is received in writing **on or before August 1, 2026**. With respect to a cancellation occurring **after August 1, 2026**, 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](http://www.nticpe.com) or contact our office at 888-515-3674 (Extension 1).

**Licensing Designations:**



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 final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors through its website: [www.learningmarket.org](http://www.learningmarket.org). NTI NASBA Sponsor Number: 103075

**NASBA Requirements:** In accordance with the new NASBA Registry standards, all self-study credit hours are determined based on a 50-minutes-per-CPE-hour measurement and have required feedback questions throughout the course. Credit measurements may vary from state to state. Your State Board of Accountancy makes the final determination of CPE credits. The self-study portion of the courses must be completed within one year of the conference dates.

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**Enrolled Agents:** 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

**CFPs:** NTI is registered with the Certified Financial Planner Board of Standards, Inc.

**CLE:** Tax courses qualify for CLE in most states. CLE credit is granted on a scale of 60 minutes per hour versus 50 minutes for CPE. Please ask for details.



## How to Register: GRAND CAYMAN, NOVEMBER 8-15, 2026

CALL 888-515-3674 (Extension 1), fax to 888-552-9749 (or email [conferences@nticpe.com](mailto:conferences@nticpe.com)) and register by credit or debit card (MC/VISA) or check. Please return this form to the address at the bottom of the page.

### REGISTRATION FORM

First and last name

Spouse/companion's name(s)

Address

City/Town

State

Zip Code

Telephone

Facsimile

Email address

### CONFERENCE INFORMATION

Check one:

\_\_\_\_\_ 40 CPEs  
 \_\_\_\_\_ 32 CPEs  
 \_\_\_\_\_ 24 CPEs

By Feb 15,  
2026

\$2,399  
 \$2,298  
 \$2,197

By June 30,  
2026

\$2,499  
 \$2,398  
 \$2,297

After June 30,  
2026

\$2,599  
 \$2,498  
 \$2,397

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

Days you are attending: (check all that apply):

Please  
check

Date

Topic

_____	11-09-26	2026 Individual Tax Update (6 CPEs-Group Live-Taxes)
_____	11-10-26	Business Tax Developments-2026 (6 CPEs-Group Live-Taxes)
_____	11-13-26	Family Individual and Business Tax Planning (6 CPEs-Group Live-Taxes)
_____	11-14-26	Creative IRA, Life Insurance and Retirement Planning Techniques (6 CPEs-Group Live-Taxes)

### HOTEL INFORMATION

Please fill in:

Arrival date: \_\_\_\_\_  
 Departure date: \_\_\_\_\_

Bedding: please check:

One king bed \_\_\_\_\_  
 Two queen beds \_\_\_\_\_

Cost of extra nights and additional persons:  
 Please call for details

\*\* Total cost per room, multiply the package  
 cost by 2.

(Nights of November 8-14, 2026)  
 (departure on November 15, 2026)

(8 days/7 nights)  
 (Per Person)  
 Double Occupancy

Room category

Please  
check

Package Cost\*\*

Ocean view with balcony	_____	\$2,507
Oceanfront with balcony	_____	\$2,944
One-bedroom oceanfront suite	_____	\$4,907

Note: Hotel package costs are subject to change without notice.

Hotel package payment: \$500 per person due with this reservation: Balance due: August 1, 2026.

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 EMAIL: [conferences@nticpe.com](mailto:conferences@nticpe.com)

## REGISTRATION FORM (CONT)- GRAND CAYMAN 2026

**PAYMENT:**

☐ Pay by check  
(mail check to address below)

☐ Charge my credit card

☐ MC  
☐ VISA

Card number

Exp date

Code

**COST:**

Conference fee \$ \_\_\_\_\_

Hotel deposit # people \_\_\_\_\_ x \$500 = \$ \_\_\_\_\_

TOTAL AMOUNT \$ \_\_\_\_\_

*[Balance of hotel package due August 1, 2026]*

State(s) for which CPE is required: \_\_\_\_\_

I am a (an): ☐ CPA ☐ Atty  
☐ PA ☐ Other  
☐ CFP

I work in: ☐ Public accounting ☐ Industry ☐ Other \_\_\_\_\_

☐ EA (PTIN \_\_\_\_\_)

**SELF-STUDY PACKET:**

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). Summary of CPEs available at this program: Live Group study= 24 CPEs; Self-Study= 16 CPEs for a total of 40 CPEs.

**Please tell us how you would like to receive your self-study materials: (CHECK ONE)**

☐ On-line access to self-study courses in a downloadable PDF format  
☐ Distribute self-study courses to you on-site at the conference

### FULL REFUND OF ALL CHARGES ON OR BEFORE AUGUST 1, 2026

**Hotel Cancellation:** Refunds for hotel cancellations will be made, **IN FULL**, if cancellation is made in writing **on or before August 1, 2026**. **No hotel refunds after August 1, 2026.** Any cancellations on or before August 1, 2026 must be made in writing and emailed to [conferences@nticpe.com](mailto:conferences@nticpe.com) or faxed to [888-552-9749](tel:888-552-9749). No refunds for early departures.

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**On August 1, 2026, I authorize NTI to charge my credit card noted above for the balance of the hotel package.**

Signed: \_\_\_\_\_

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Email this form to: [conferences@nticpe.com](mailto:conferences@nticpe.com), or

Mail this form to: NTI Conferences, P.O. Box 375, Burlington, MA 01803

For more information, please visit our website at: [www.nticpe.com](http://www.nticpe.com).

12-18-25 REV

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