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Sales and Use Tax in Wisconsin

La Crosse, WI • July 24, 2013

Faculty

Jack E. DeYoung, CPA

Tax Consultant

James A. San Fillippo, CPA, CMI

BDO USA, LLP

For more information about our speakers, go to www.lorman.com/ID391481.

Learn sales and use tax essentials now that will save money for your company or clients tomorrow.

You can avoid crippling fines and make tax audits manageable with an updated knowledge of Wisconsin sales and use tax rules and regulations. Attend this seminar and we will help you identify a myriad of sales and use tax issues relevant to your company or clients.

Register today and understand the sales and use tax complexities that confound many business owners. You will find out what's taxable, the best way to handle multistate issues and how to survive sales tax audits. Don't end up with the penalties and interest that are so dangerous for your budget in this volatile economy – register today!

Benefits for You

- Don't get caught off-guard – know what scenarios result in nexus
- Get ahead in your field ... properly handle industry-specific issues
- Ease the pain of audits using strategies from the experts
- Hear the latest on new legislation and Department of Revenue interpretations – stay ahead of the game

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Learning Objectives

- You will be able to review nexus information.
- You will be able to discuss manufacturing and construction contractors issues.
- You will be able to explain recordkeeping and exemption certificates.
- You will be able to describe new developments and legislation.

For more detailed CE credit information, visit us at www.lorman.com/ID391481 or contact us at 866-352-9540.



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Seminar Agenda

8:00 AM – 8:30 AM	Registration		
8:30 AM – 9:05 AM	General – Sales vs. Use Tax, Sales Price, Purchase Price, Accounting Methods — James A. San Fillippo, CPA, CMI		
9:05 AM – 9:30 AM	Nexus — Jack E. DeYoung, CPA		
	<ul style="list-style-type: none">• Activities That Create Nexus• Ways to Avoid Nexus Problems		
9:30 AM – 9:45 AM	When and Where Sale Takes Place – Property and Services — Jack E. DeYoung, CPA		
9:45 AM – 11:00 AM (Break 10:05 AM – 10:15 AM)	What's Taxable and What's Exempt? — James A. San Fillippo, CPA, CMI		
11:00 AM – 12:00 PM	Manufacturing — Jack E. DeYoung, CPA		
	<ul style="list-style-type: none">• What Is Manufacturing?• What Is Exempt?		
12:00 PM – 1:00 PM	Lunch (On Your Own)		
1:00 PM – 1:50 PM	Construction Contractors — James A. San Fillippo, CPA, CMI		
	<ul style="list-style-type: none">• Tax Treatment – Real vs. Personal Property• Repairs vs. Replacement• Construction for Exempt Entities		
1:50 PM – 2:10 PM	County Sales Taxes and Other Local Taxes — Jack E. DeYoung, CPA		
	<ul style="list-style-type: none">• What's Taxable and Exempt?		
		2:10 PM – 2:25 PM	Nonprofit Organizations — James A. San Fillippo, CPA, CMI
			<ul style="list-style-type: none">• Purchases by Nonprofits• Sales by Nonprofits
		2:25 PM – 2:35 PM	Break
		2:35 PM – 3:20 PM	Specific Issues – Computer Software, Advertising/Direct, Bundled Trans, Occasional Sales — Jack E. DeYoung, CPA and James A. San Fillippo, CPA, CMI
		3:20 PM – 3:35 PM	Recordkeeping and Exemption Certificates — James A. San Fillippo, CPA, CMI
		3:35 PM – 4:15 PM	Audits, Common Errors and Penalties — Jack E. DeYoung, CPA
			<ul style="list-style-type: none">• Managing an Audit• Common Audit Adjustments• Ways to Avoid Penalties
		4:15 PM – 4:30 PM	New Developments and Legislation — James A. San Fillippo, CPA, CMI
			<ul style="list-style-type: none">• New Laws• Court Decisions• New Interpretations and Developments by the Department of Revenue

Presented By:

Jack E. DeYoung, CPA

- Owner of a tax consulting business
- Assists businesses in sales tax planning, audit and appeal support, refund and compliance reviews, tax research, training and utilizing sales tax exemptions
- Formerly worked for a CPA firm as a tax consultant
- Member of the WICPA Wisconsin Taxation Committee
- Former Wisconsin Department of Revenue auditor, director of appeals and assistant administrator
- Recipient of the Outstanding Tax Professional Award
- Frequent speaker on sales tax and local tax issues
- Graduate, University of Wisconsin-Madison
- Can be contacted at 608-222-8156 or jackdeyoung@charter.net

James A. San Fillippo, CPA, CMI

- Multistate tax expert with BDO USA, LLP
- More than 20 years of experience in state and local tax issues
- Expertise in audit defense, refund reviews, due diligence and transactional planning
- Experience serving clients in the manufacturing, retail, contracting, printing and service industries
- Former corporate auditor with the Wisconsin Department of Revenue
- Chairperson of WICPA State Tax Committee
- Frequently speaks on sales and use tax issues
- Bachelor's degree in accounting, University of Wisconsin-Milwaukee

Yes!
Sign
me up!

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Purchase Options – Check All That Apply

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 Add a CD recording of this program – \$99*
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 FAX: 715-833-3953
 MAIL: Mail this form with payment to:
 Lorman Education Services
 Dept. 5382, P.O. Box 2933
 Milwaukee, WI 53201-2933

Where Is It?

Radisson Hotel La Crosse
 200 Harborview Plaza
 La Crosse, Wisconsin
 608-784-6680

Who Should Attend?

This seminar is designed for accountants, CPAs, controllers, accounts payable professionals, CFOs, tax managers, preparers and officers, presidents and vice presidents, finance professionals, bookkeepers and attorneys.

GENERAL INFORMATION:

- This seminar may be recorded.
- If you need special accommodations, please contact us two weeks in advance of the program.
- Lorman Education Services is not approved to offer self-study CPE credit for accountants; therefore, no CPE will be given for this program if ordered as a self-study package.

CANCELLATIONS: Substitute registrants can be named at any time. A full refund, less a \$20 service charge, will be given if notification is given six or more business days in advance. Notification of less than six business days will result in a credit that can be applied to any Lorman products or services. If you do not cancel or attend, you are responsible for the entire payment.

Learn sales and
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