2016 Resort Conference and Self-Study Program

CPE for Accountants in Public Accounting and Industry
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

2016 Federal Income Tax Update
Objective: To discuss recent developments related to federal income taxation of individuals. This course focuses on various tax issues related to individual taxation. Topics include the impact of proposed tax legislation including 2016 tax changes related to ObamaCare, changes in tax rates, recent cases, rulings and regulations, practice issues. The course will also address pending tax issues from Washington.

2016 Business Tax Developments
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 review of cases, rulings and regulations as they affect small closely held businesses, the impact of ObamaCare on the taxation of businesses in 2016 and beyond, and more.

New Developments - Estate, Gift and Retirement Planning - 2016 - Parts I & II
Objective: To discuss a variety of new developments related to estate, gift, and retirement planning. This course deals with recent 2016 cases and rulings, regulations and other changes related to estate planning including those affecting business valuations, discounts, hot topics, planning strategies, and more. Specific topics vary depending on the status of tax legislation but will include a discussion of pending legislation affecting estate and gift taxation, retirement tax issues, and more.

Selected Pass-Through Entity Strategies
Objective: To address selected issues related to pass-through entities. This course addresses tax planning involving pass-through entities. Topics include a reconsideration of which pass through entity makes sense, shareholder and operating agreements, employment and consulting contracts, discounts on minority interests, the rule of trusts and estates in the operation of pass-through entities, termination of pass-through entities either through sale or transfer, impact of bankruptcy, and more.

2016 Individual and Business Tax Update
Objective: To discuss recent developments related to federal income taxation of individuals and businesses. This course focuses on various 2016 tax issues related to individual and businesses taxation. Topics include the impact of tax legislation including tax changes update on taxation under ObamaCare including 2016 implementation issues, changes in tax rates, recent cases, rulings and regulations, practice issues. This course also addresses tax issues related to businesses including key matters involving C corporations, S corporations, LLCs and partnerships.

Family Tax Planning - Part I and II
Objective: To discuss a variety of unique tax and financial planning issues related to families and their members. This course is presented in two parts, and addresses tax and financial planning issues confronting family members with particular focus on unique situations. Topics include: tax and financial planning involving for couples contemplating divorce, nontraditional families and couples, and parents of children with special needs. Other topics of focus include use of special needs trusts, issues involving closely held businesses and family members, family rental issues including the self-rental rule, an overview of the unearned income medicare contributions tax, unique issues involving sale of the home, dealing with Supplemental Security Income, Social Security Disability Income, Medicare, and Medicaid), and more.

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

2016 Current Developments - Accounting and Financial Reporting
Objective: To discuss a variety of new developments related to accounting and financial reporting. This course addresses numerous new developments affecting the accounting profession. Topics include: new FASB accounting standards updates, new lease standard, new revenue standard, disclosure issues, recent disclosure changes, small business private company GAAP exceptions, practice issues, and more. Field of study: Accounting

Compilation, Review, and Auditing Update and Review
Objective: To discuss a variety of new developments related to financial reporting including compilation, review and audit engagements. This course focuses on numerous new developments related to financial reporting including compilation, review and audit engagements. Topics include: implementation issues involving the newly issued SSARS No. 21 compilation and review standards, new compilation of forecasts and projections, tax basis financial statements, update on auditing standards, proposed changes to the format of financial statement, peer review issues, performing nonattest services for an attest client, streaming engagements for profit, independence issues, and more. Field of study: Auditing

2016 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 standards 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. 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 NASBAs Registry measurement of 50 minutes per CPE hour. Certain states grant CPE credit using different measurements. Please consult with your state licensing board.
THOMAS M. BRINKER, JR., CPA/PFS, CGMA, ChFC, CFE, AEP
Professor of Accounting at Arcadia University in Glenside, Pennsylvania. Currently tax consultant to local CPA and law firms in the Philadelphia area specializing in tax planning for individuals and their businesses, as well as tax planning for families and special needs children. National speaker on various tax topics, and author of dozens of articles in numerous journals, including The Journal of Accountancy, The Journal of International Taxation, and The Tax Adviser, and The CPA Journal. Recipient of awards for teaching excellence, including the PICPA Educator of the Year Award.

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.

ALBERT L. GRASSO, JD, LLM
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, LLM, 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 SCHLESINGER, JD, LLM
Partner with the firm of Schlesinger & Sussman, New York, NY. Former Adjunct Professor of Law, Pace University Law School. Author of Practical Guide to S Corporations. (CCH 4th edition), and more than sixty articles on taxation.

JAMES P. SWEENEY, CPA, CVA, MBA, MTAX
Tax resource partner with McGladrey specializing in planning for clients throughout the United States. National Chairman and Co-Chairman of several AICPA committee and subcommittee working groups, including lead author of practitioner public comments papers regarding proposed regulations issued to

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

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

www.nticpe.com e-mail: conferences@nticpe.com
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. Georgetown, the capital city of Grand Cayman, boasts some of the finest cuisine and duty-free shopping in all the Caribbean. Explore a sunken wreck, dance the night away, go duty-free shopping or explore the island — Grand Cayman is the place to be!

HOTEL ACCOMMODATIONS:
Discover The Ritz-Carlton, Grand Cayman, and experience a place where sparkling blue waters blend seamlessly with the sand and sky. Located on an archipelago of three picturesque islands, The Ritz-Carlton, Grand Cayman hotel offers a breathtaking location unlike anywhere else on earth. From the white sands of Seven Mile Beach to world-renowned restaurants, The Ritz-Carlton, Grand Cayman offers guests an unforgettable and luxurious escape. Hotel Rating: AAA 5-Diamond, Forbes 5-Star.

GROUP BASE HOTEL PACKAGE:
• 8 days/7 nights: Resort View: $1,660 per person, based on double occupancy, including hotel taxes and resort fee.
• Upgrades to Oceanfront and Oceanfront Club - limited availability, please ask for details.
• Package excludes the cost of conference fees.

May 22 Sun
Arrival 6:00 - 6:30pm
Hospitality Desk - Welcome to Grand Cayman Orientation Meeting

May 23 Mon
7:30am-12:50pm 2016 Federal Income Tax Update
CPE Hours: 6 Group Live - Taxes*
6:00pm-7:00pm Reception hosted by NTI

May 24 Tue
7:30am-12:50pm New Developments: Estate, Gift and Retirement Planning- 2016- Part I
CPE Hours: 6 Group Live - Taxes*
9:00am-10:00am Spouse/Guest Breakfast

May 25 Wed
Day of leisure No meeting scheduled

May 26 Thu
Day of leisure No meeting scheduled

May 27 Fri
7:30am-12:50pm New Developments: Estate, Gift and Retirement Planning- 2016- Part II
CPE Hours: 6 Group Live - Taxes*

May 28 Sat
7:30am-12:50pm 2016 Business Tax Developments
CPE Hours: 6 Group Live - Taxes*

May 29 Sun
Recommended day of departure

Suggested Activities for You and Your Family:
• Duty-free shopping in Georgetown • 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 aboard the Jolly Roger • Golf • Atlantis Deep Dive Submarine • Dining at any island restaurants

*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.
Just off the coast of the Carolinas lies Bermuda, with its pink sand beaches, fine cuisine, afternoon high tea, and hibiscus-lined streets. A sub-tropical paradise. And a paradise for shoppers, golfers, and water sports enthusiasts in an idyllic, peaceful island setting.

**HOTEL ACCOMMODATIONS:**
The Fairmont Southampton is Bermuda’s only world-class resort, atop Bermuda’s highest point, on 100 lush acres with dramatic views of the ocean below. Each of the hotel’s 600 spacious and airy guest rooms capture the spirit of the sea and the sky, and each with a spectacular balcony view of either the ocean or bay. The Princess has six fabulous restaurants, a luxurious beach club, tennis, health club with spa facilities, and an 18-hole executive golf course. A water shuttle for transfers between the hotel and the town of Hamilton. **Hotel Rating: AAA 4-Diamond.**

**GROUP BASE HOTEL PACKAGE:**
- 7 days/6 nights: Fairmont Run of House: $1,532 per person, double occupancy, including taxes, resort levy, and gratuities.
- Upgrades: Deluxe Sea View and Fairmont Gold Sea View - limited availability. Please ask for details.
- Package excludes the cost of conference fee and tours.

**Jun 20 Mon**
- Arrival 6:00 - 6:30pm
- **Hospitality Desk - Welcome to Bermuda Orientation Meeting**

**Jun 21 Tue**
- 7:30am-12:50pm **Family Tax Planning- Part I**
  - CPE Hours: 6 Group Live - Taxes*
  - Reception hosted by NTI
- 6:00pm - 7:00pm **Family Tax Planning- Part I**
  - CPE Hours: 6 Group Live - Taxes*

**Jun 22 Wed**
- 7:30am-12:50pm **Family Tax Planning- Part II**
  - CPE Hours: 6 Group Live - Taxes*
  - Spouse/Guest Breakfast
- 9:00am-10:00am **Family Tax Planning- Part II**
  - CPE Hours: 6 Group Live - Taxes*

**Jun 23 Thu**
- Day of leisure
- No meeting scheduled

**Jun 24 Fri**
- 7:30am-12:50pm **2016 Federal Income Tax Update**
  - CPE Hours: 6 Group Live - Taxes*

**Jun 25 Sat**
- 7:30am-12:50pm **2016 Business Tax Developments**
  - CPE Hours: 6 Group Live - Taxes*

**Jun 26 Sun**
- Recommended day of departure

**Suggested Activities for You and Your Family:**
- Shopping in Hamilton • Horseback Riding • Bermuda Aquarium, Museum & Zoo • Bermuda Perfumery Factory • Bermuda Glass Blowing Studio • Bermuda National Gallery • The Crystal Caves of Bermuda • Dolphin Quest Bermuda • Royal Naval Dockyard Maritime Museum • Bermuda Underwater Exploration Institute • Botanical Gardens • Bermuda Golf • St. Peter’s Church • Tucker’s House

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Hilton Head Island is the largest barrier island on the southern Atlantic seacoast. With more than just 12 miles of beach, the island is consistently listed as an award-winning family destination. The island has an eco-friendly point of view offering 50 miles of paths for bicycling and hiking along the shore. With more than 250 restaurants, 24 golf courses, spectacular beaches, and in excess of 200 shops, Hilton Head Island offers something for everyone. Located just 45 minutes from Savannah and just over an hour from Charleston, both are convenient from the resort at Hilton Head Island for day trips, or for additional options for air transportation.

HOTEL ACCOMMODATIONS:
The Sonesta Resort Hilton Head Island offers relaxing accommodations in Hilton Head, South Carolina. Set on 11 acres of beautifully landscaped beachfront property, this AAA approved Four Diamond family-friendly hotel recently completed a $30 million renovation and features a spectacular swimming pool complex, Arum Spa, casual and fine dining opportunities, on-site bicycle rentals and is convenient to world-class golf and tennis. The spacious guest rooms and suites offer views of the Shipyard Plantation grounds, lush tropical gardens, swimming pools and the Atlantic Ocean. Hotel rating: AAA 4-Diamond.

GROUP BASE HOTEL PACKAGE:
• 7 days/6 nights: Garden/pool view: $995 per person, double occupancy, including tax and resort fee.
• Upgrades to Partial Oceanview: Please ask for details.
• Package excludes the cost of conference fee.

 Jul 17 Sun Arrival 6:00 - 6:30pm Hospitality Desk - Welcome to Hilton Head Orientation Meeting
 6:00pm- 7:00pm
 Jul 19 Tue 7:30am-12:50pm 2016 Business Tax Developments CPE Hours: 6 Group Live - Taxes*
 9:00am-10:00am Spouse/Guest Breakfast
 Jul 20 Wed Day of leisure No meeting scheduled
 Jul 21 Thu 7:30am-12:50pm Family Tax Planning- Part I CPE Hours: 6 Group Live - Taxes*
 Jul 22 Fri 7:30am-12:50pm Family Tax Planning- Part I CPE Hours: 6 Group Live - Taxes*
 Jul 23 Sat Recommended day of departure

Suggested Activities for You and Your Family:
• Hilton Head Crabbing Cruise • Dolphin Cruise • Hilton Head Horseback Riding • Plantation • Hilton Head Boat Charters • Savannah Ghost Tour • Daufuskie Island • Kayak Tours, Dolphin ECO and Shark Fishing

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From a distance, a train whistle echoes as a sure reminder of the Canadian Pacific Railway heritage, while trendy shops dot every street corner and the magnificent mountain landscape surrounds downtown. Once known as a marvelous summer location that used to close its doors in the winter months, Banff and the Canadian Rockies area now attracts more than 4.5 million visitors a year. Banff is located inside Canada’s premier Banff National Park. Whether you explore the landscape by car, canoe or raft on foot or bicycle — enjoy the most spectacular scenery and wildlife on earth!

**HOTEL ACCOMMODATIONS:**
Located in the heart of Banff National Park, a UNESCO World Heritage Site, the world-famous Fairmont Banff Springs Hotel stands as a landmark in the picturesque alpine town of Banff, Alberta, Canada’s “Castle in the Rockies”. This hotel has been providing legendary hospitality to guests for more than 125 years, and offers stunning vistas, exceptional regional cuisine and impeccable service. Hotel rating: AAA 4-Diamond.

**GROUP BASE HOTEL PACKAGE:**
- 7 days/6 nights- Deluxe Room - $1,496 per person, double occupancy, including taxes and resort fee.
- Upgrades to Junior Suites - limited availability. Please ask for details.
- Package excludes the cost of the conference fee.

| Jul 24 | Sun | Arrival 6:00 - 6:30pm | Hospitality Desk - Welcome to Banff Orientation Meeting |
| Jul 25 | Mon | 7:30am-12:50pm | 2016 Federal Income Tax Update |
|       |     | 6:00pm-7:00pm      | Reception hosted by NTI |
| Jul 26 | Tue | 7:30am-12:50pm | New Developments: Estate, Gift and Retirement Planning-2016-Part I |
|       |     | 9:00am-10:00am    | CPE Hours: 6 Group Live - Taxes* |
|       |     |                    | Spouse/Guest Breakfast |
| Jul 27 | Wed | Day of leisure | No meeting scheduled |
| Jul 28 | Thu | 7:30am-12:50pm | New Developments: Estate, Gift and Retirement Planning-2016-Part II |
|       |     |                    | CPE Hours: 6 Group Live - Taxes* |
| Jul 29 | Fri | 7:30am-12:50pm | 2016 Business Tax Developments |
|       |     |                    | CPE Hours: 6 Group Live - Taxes* |
| Jul 30 | Sat | Recommended day of departure | |

**Suggested Activities for You and Your Family:**
- Banff Gondola
- Lake Louise Gondola
- Helicopter Tours
- Hiking
- Horseback Riding
- Mountain Biking
- Summer Coach Tours
- Tennis
- Canoeing/Kayaking
- Canoeing at Lake Louise
- Lake Minnewanka Boat Cruise to Devil’s Gap
- Lake Minnewanka Boat Rentals
- Lake Minnewanka Guided Charter Fishing Trips
- River Float Trips
- Whitewater Rafting
- Banff Springs Bowling and Entertainment Center
- Heritage Tour of the Castle
- Banff Springs Kids’ Club

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Chatham has long been recognized for its exquisite natural beauty. Picture-perfect streets are lined with 18th century homes, Cape Cod cottages and glorious gardens. Anchored by the historic Chatham lighthouse, the village boasts a lively, architecturally rich Main Street where merchants cater to locals and strolling visitors from around the world. The town celebrates its sense of place through well-loved summertime traditions such as free Friday night band concerts, and Chatham A’s baseball games, that is a Norman Rockwell painting come to life. Nearly surrounded by water and dotted with ice age “kettle ponds,” Chatham offers a number of beaches, varied water sports and a scenic 4.5 mile bike trail.

**HOTEL ACCOMMODATIONS:**

Chatham Bars Inn, member of the “Leading Hotels of the World,” is New England’s premier oceanfront resort and a renowned Cape Cod landmark. The turn-of-the-century main inn sits gracefully atop a rise overlooking Pleasant Bay and the open Atlantic Ocean. From a wicker couch on the front verandah, one can take in a broad stretch of coastline while enjoying a subtle Cape Cod breeze.

**GROUP BASE HOTEL PACKAGE:**

- 6 days/5 nights: Run of House - $1,285 per person, double occupancy, including taxes and resort fee.
- Upgrades to Ocean View and Ocean View Suite: Please ask for details.
- Package excludes the cost of conference fee.

**Suggested Activities for You and Your Family:**

- Visit Martha’s Vineyard/Nantucket
- Chatham Light House
- Cape Cod Canal Cruise
- Whale Watching
- Golf
- Bicycling
- Seal Watching Tours
- Dune Tours
- Main Street Shopping
- Kayaking
- Sailing Charters.

*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.
EUROPEAN CRUISE
CUNARD’S QUEEN VICTORIA
AUG 6-13, 2016

Roundtrip Rome, Barcelona, Corsica, Monte Carlo, & Florence/Pisa

Join NTI on a Mediterranean cruise on the luxurious Cunard’s Queen Victoria. This western Mediterranean discovery spans seven nights roundtrip from Rome. Understand Gaudi’s unique imprint on Barcelona. Visit Ajaccio in Corsica, France, where Napoleon was born. Admire Monte Carlo’s Grand Casino, then gaze in awe upon Florence’s Duomo and Ponte Vecchio. Spend a few nights in Rome before or after the cruise.

**HOTEL ACCOMMODATIONS:**

Queen Victoria is known for her elegance and her graceful splendor. Her unique facilities are amongst the most modern you will find, and yet she has a special ambiance evocative of great liners of the past. With luxurious marbles, woods, and rich fabrics, she exudes elegance and is adored by her crew and passengers alike.

**GROUP BASE CRUISE PACKAGE:**

8 days / 7 nights. For cruise accommodation and prices, please visit www.nticpe.com, or call 888-515-3674 (Ext 1), or email: conferences@nticpe.com.

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<th>Port of Call</th>
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*Note: Breakfast will be served in the ship’s dining room prior to the meeting. 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 PDF downloadable format or mailed to you in a manual format in advance of the conference. Self-study materials will not be distributed at the conference. Summary of CPEs available at this program: Live Group study= 24 CPEs; Self-Study=16 CPEs for a total of 40 CPEs.*
Sonoma Wine Country. Vineyards that climb rolling hills and reach for the sky let you know you’ve arrived in “Sonoma Country.” A mere 30 miles from San Francisco’s Golden Gate Bridge, the land of plenty endows visitors with an experience of a lifetime. Sonoma Country isn’t just for wine lovers; it embodies the California lifestyle. Wine and dining are an integral part of this area. Quaint towns await your discovery. From hiking to theater, shopping and golfing, and luxurious spas, you can find it all in beautiful Sonoma Wine Country.

HOTEL ACCOMMODATIONS:
Fairmont Sonoma Mission Inn and Spa is just a short drive from downtown Sonoma, California, a charming small town offering year round outdoor activities, events, festivals, dining and shopping. The hotel offers a luxury spa, championship golf course and fine dining, all in one first-class destination in the heart of Sonoma Valley. The Fairmont is the ultimate elegant oasis, blessed by natural mineral hot springs in the heart of the California Wine Country. A true lifestyle!

GROUP BASE HOTEL PACKAGE:
• 7 days/6 nights: Run of House - $1,362 per person, double occupancy, including taxes.
• Upgrades to Mission Suite: Please ask for details.
• Package excludes the cost of conference fee.

Sep 18 Sun Arrival 6:00 - 6:30pm Hospitality Desk - Welcome to Sonoma Orientation Meeting
Sep 19 Mon 7:30am-12:50pm 2016 Federal Income Tax Update CPE Hours: 6 Group Live - Taxes*
6:00pm- 7:00pm Reception hosted by NTI
Sep 20 Tue 7:30am-12:50pm 2016 Business Tax Developments CPE Hours: 6 Group Live - Taxes*
9:00am-10:00am Spouse/Guest Breakfast
Sep 21 Wed Day of leisure No meeting scheduled
Sep 22 Thu 7:30am-12:50pm New Developments: Estate, Gift and Retirement Planning, 2016- Part I CPE Hours: 6 Group Live - Taxes*
Sep 23 Fri 7:30am-12:50pm New Developments: Estate, Gift and Retirement Planning, 2016- Part II CPE Hours: 6 Group Live - Taxes*
Sep 24 Sat Recommended day of departure

Suggested Activities for You and Your Family:
• Historic Railroad Square • Discover Russian River Valley • Enjoy the Spa • Play Golf • Hiking and Biking Tours • Historic Sonoma Plaza
• Winery Tours • Ballooning • Horseback riding • Grape Stomp • Winery Dinner • Sonoma Walking Tour • Explore California Redwood Forests • Antique shopping • Sonoma Performing Arts • Attend a Culinary class • Cycling • Fishing • Kayaking • Farmer’s Market • Day trip to San Francisco

*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.
Situated in the Blue Ridge Mountains of North Carolina is the town of Asheville. Visitors experience a step back in time as the town is filled with charming shops, antiques, fine restaurants and the Biltmore Estate. The Biltmore Estate is America’s largest home, a country retreat to the Vanderbilt family more than a century ago, and touted as “One of the Top Ten National Wonders” and “50 Must-See Destinations in America” by National Geographic Traveler.

**HOTEL ACCOMMODATIONS:**
Nestled within the legendary Blue Ridge Mountains of North Carolina, the magnificent Grand Bohemian Hotel Asheville, welcomes you with boutique charm and the perfect balance of style and substance. Hotels should be inspiring, and this belief extends to each of the Grand Bohemian’s Tudor-style rooms and suites, with their stone flooring, boutique amenities, and state-of-the-art technology. Discover unparalleled elegance at the Grand Bohemian. **Hotel rating: AAA 4-Diamond.**

**GROUP BASE HOTEL PACKAGE:**
- 6 days/5 nights: Run of House - Main Hotel: $944 per person, double occupancy including hotel taxes.
- Upgrade to Executive King Junior Suite: Limited availability, please ask for details.
- Package excludes the cost of conference fee.

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<tr>
<th>Date</th>
<th>Time</th>
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<tr>
<td>Oct 16 Sun</td>
<td>6:00-6:30pm</td>
<td>Hospitality Desk - Welcome to Asheville Orientation Meeting</td>
</tr>
<tr>
<td>Oct 17 Mon</td>
<td>7:30am-12:50pm</td>
<td>2016 Federal Income Tax Update CPE Hours: 6 Group Live - Taxes*</td>
</tr>
<tr>
<td></td>
<td>6:00- 7:00pm</td>
<td>Reception hosted by NTI</td>
</tr>
<tr>
<td>Oct 18 Tue</td>
<td>7:30am-12:50pm</td>
<td>2016 Business Tax Developments CPE Hours: 6 Group Live - Taxes*</td>
</tr>
<tr>
<td></td>
<td>9:00am-10:00am</td>
<td>Spouse/Guest Breakfast</td>
</tr>
<tr>
<td>Oct 19 Wed</td>
<td>Day of leisure</td>
<td>No meeting scheduled</td>
</tr>
<tr>
<td>Oct 21 Fri</td>
<td>7:30am-12:50pm</td>
<td>2016 Compilation, Review, and Auditing Update and Review CPE Hours: 6 Group Live - Auditing*</td>
</tr>
</tbody>
</table>

**Suggested Activities for You and Your Family:**
- Tour the Biltmore Estate
- Drive along the Blue Ridge Mountains
- Hike the biking trails
- Visit the Biltmore Wine Vineyard
- Antiquing and shopping
- Bowling
- Fly-fishing
- Hiking
- Horseback riding
- Jogging/fitness trail
- Mountain biking
- Visit a nature preserve
- River rafting
- Rock climbing
- Tennis

*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.
Turquoise Caribbean waters and white, sandy beaches. Explore the winding hills and mountain roadways for the most breathtaking panoramic views at this lush tropical paradise. On St. Thomas you will find everything from fine dining restaurants to a spectacular 18-hole golf course, a marina park, several tennis facilities, and boats for charter. Rent a car, take a guided tour or simply walk and experience one fantastic view after another.

**HOTEL ACCOMMODATIONS:**
Escape to an island resort oasis in St. Thomas surrounded by crystal blue waters, white sand and lush tropical greenery. A breathtaking 30-acre, oceanfront luxury hotel, The Ritz-Carlton, St. Thomas is a Caribbean marvel styled after traditional island architecture, but richly updated with all of the contemporary comforts the resorts of The Ritz-Carlton are known for. As the finest resort in St. Thomas, The Ritz-Carlton, St. Thomas embodies the relaxed refinement of the U.S. Virgin Islands. Allow yourself to be transported by the blissful experience that awaits you. **Hotel Rating: AAA 4-Diamond.**

**GROUP BASE HOTEL PACKAGE:**
- 8 days/7 nights: Resort View: $1,598 per person, double occupancy, including room tax and resort fee.
- Upgrade to Ocean View, Club Ocean View, and One Bedroom Ocean View Suite: Limited Availability, please ask for details.
- Package excludes the cost of conference fee.

<table>
<thead>
<tr>
<th>Nov 6</th>
<th>Sun</th>
<th>Arrival 6:00 - 6:30pm</th>
<th>Hospitality Desk - Welcome to Boca Raton Orientation Meeting</th>
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<tbody>
<tr>
<td>Nov 7</td>
<td>Mon</td>
<td>7:30am-12:50pm</td>
<td>New Developments: Estate, Gift and Retirement Planning, 2016- Part I CPE Hours: 6 Group Live - Taxes*</td>
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<tr>
<td></td>
<td></td>
<td>6:00pm-7:00pm</td>
<td>Reception hosted by NTI!</td>
</tr>
<tr>
<td>Nov 8</td>
<td>Tue</td>
<td>7:30am-12:50pm</td>
<td>New Developments: Estate, Gift and Retirement Planning, 2016- Part II CPE Hours: 6 Group Live - Taxes*</td>
</tr>
<tr>
<td></td>
<td></td>
<td>9:00am-10:00am</td>
<td>Spouse/Guest Breakfast</td>
</tr>
<tr>
<td>Nov 9</td>
<td>Wed</td>
<td>Day of leisure</td>
<td>No meeting scheduled</td>
</tr>
<tr>
<td>Nov 10</td>
<td>Thu</td>
<td>Day of leisure</td>
<td>No meeting scheduled</td>
</tr>
<tr>
<td>Nov 11</td>
<td>Fri</td>
<td>7:30am-12:50pm</td>
<td>2016 Federal Income Tax Update CPE Hours: 6 Group Live - Taxes*</td>
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<tr>
<td>Nov 12</td>
<td>Sat</td>
<td>7:30am-12:50pm</td>
<td>2016 Business Tax Developments CPE Hours: 6 Group Live - Taxes*</td>
</tr>
<tr>
<td>Nov 13</td>
<td>Sun</td>
<td>Recommended day of departure</td>
<td></td>
</tr>
</tbody>
</table>

**Suggested Activities for You and Your Family:**
- Snorkeling in Trunk Bay
- Shopping in St. Thomas
- Sunset sail
- Boat trip to Virgin Gorda
- Hiking in Virgin Islands National Park
- Guided horseback riding
- Atlantis submarine
- Explore Maho Bay and Cinnamon Bay

*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.
Maui magic- Tropical breezes, 120 miles of dramatic coastline, more than 80 golden-sand beaches, and hundreds of waterfalls. Only on Maui will you find the unforgettable, rugged “Road to Hana” featuring the Seven Sacred Pools, Haleakala Crater- the world’s largest dormant volcano- and the bustling historic whaling village of Lahaina. On the sunny side of Maui is the sun-soaked Wailea Beach. In the distance, there are lush valleys carved into mountains reveal the inspiration for Maui’s nickname: Valley Isle. Wailea is known not only for its beaches and sunshine, but also its high-end shopping at the Shops at Wailea, offering more than 70 stores from Louis Vuitton to Tiffany.

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 relaxed elegance. Hotel Rating: AAA 5-Diamond, Forbes 5-Star.

GROUP BASE HOTEL PACKAGE:
- 8 days/7 nights: Garden View: $1,878 per person, double occupancy, including taxes.
- Upgrades to Ocean View, subject to availability. Please ask for details.
- Package excludes the cost of the conference fee.

NOV 27 - DEC 4, 2016 MAUI HAWAII

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Fax: 888-552-9749  
www.nticpe.com  
e-mail: conferences@nticpe.com
Cost includes all materials, continental breakfast at each meeting (for participants only), and a sunset 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 60 days prior to the first day of the conference. With respect to a cancellation occurring within 60 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 and cruise 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 60 days prior to the beginning of the conference. For cancellations within 60 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. Cruise Cancellation Policy: Please see dossier for cruise cancellation policy.

**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 $200 per person (cruise deposits vary), balance is due 45 days prior to departure).

**CPE Pricing**

<table>
<thead>
<tr>
<th>CPEs</th>
<th>24CPEs</th>
<th>32CPEs</th>
<th>40CPEs</th>
</tr>
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<tbody>
<tr>
<td>By Jan 31, 2016</td>
<td>$1,197</td>
<td>$1,248</td>
<td>$1,299</td>
</tr>
<tr>
<td>By May 31, 2016</td>
<td>$1,247</td>
<td>$1,298</td>
<td>$1,349</td>
</tr>
<tr>
<td>After May 31, 2016</td>
<td>$1,297</td>
<td>$1,348</td>
<td>$1,399</td>
</tr>
</tbody>
</table>

Add $100 Surcharge for European Cruise

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**Hotel/cruise Location Date Please check package**

- **Grand Cayman May 22-29**: 7 nts $1,660
- **Bermuda Jun 20-26**: 6 nts $1,532
- **Hilton Head Island Jul 17-23**: 6 nts $995
- **Banff Jul 24-30**: 6 nts $1,496
- **European Cruise Aug 6-13**: Please ask
- **Cape Cod Aug 28-Sept 2**: 5 nts $1,285
- **Sonoma Sep 18-24**: 6 nts $1,362
- **A什ville Oct 16-21**: 5 nts $944
- **St. Thomas Nov 6-13**: 7 nts $1,598
- **Maui Nov 27 - Dec 4**: 7 nts $1,878

*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.

**To register:**

Call 888-815-3674, Extension 1 or fax 888-552-9749

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
Choose from 2 Self-Study options.

Option 1: Purchase Individual Courses

Option 2: Purchase Unlimited CPE

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

- 22 Courses available for download in PDF format upon purchase (SEE COURSE LISTING ON PAGE 16).
- 285 hours in taxation, 136 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.

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

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
Danny C. Santucci, JD
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
Danny C. Santucci, JD
Paper/Manual Format: Item 101: 35 CPEs $349
Emailed PDF: Item 101-E: 35 CPEs $269

TAX, BANKRUPTCY AND FINANCIAL PROBLEMS
Danny C. Santucci, JD
Paper/Manual Format: Item 12: 19 CPEs $219
Emailed PDF: Item 12-E: 19 CPEs $149

DEFENSIVE DIVORCE
Danny C. Santucci, JD
Paper/Manual Format: Item 620: 16 CPEs $199
Emailed PDF: Item 620-E: 16 CPEs $129

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Paper/Manual Format: Item 511: 21 CPEs $249
Emailed PDF: Item 511-E: 21 CPEs $179

FAMILY TAX PLANNING
Danny C. Santucci, JD
Paper/Manual Format: Item 70: 24 CPEs $249
Emailed PDF: Item 70-E: 24 CPEs $179

CHOICE OF ENTITY NEW
Danny C. Santucci, JD
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Emailed PDF: Item 610-E: 22 CPEs $179

SPECIAL PROBLEMS IN REAL ESTATE TAXATION
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Emailed PDF: Item 22-E: 11 CPEs $109

FAST TRACK RETIREMENT PLANNING NEW
Danny C. Santucci, JD
Paper/Manual Format: Item 23: 17 CPEs $199
Emailed PDF: Item 23-E: 17 CPEs $129

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 NEW!
New Compilation and Review Standards
Steven C. Fustolo, CPA, MBA
Paper/Manual Format: Item 32: 10 CPEs $139
Emailed PDF: Item 32-E: 8 CPEs $99

2016 FASB REVIEW BEST SELLER!
Steven C. Fustolo, CPA, MBA
Paper/Manual Format: Item 30: 16 CPEs $199
Emailed PDF: Item 30-E: 16 CPEs $129

CURRENT DEVELOPMENTS — ACCOUNTING AND FINANCIAL REPORTING
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Emailed PDF: Item 31-E: 20 CPEs $149

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

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