ACCELERATED TAX EXPERTISE IN THE NEW YEAR

With all of the dynamic changes taking place at the federal, state, and international levels, there’s never been a better time to leverage the taxation expertise of Bloomberg BNA. From the full implementation of the Affordable Care Act and the national legalization of same-sex marriage, to groundbreaking international trade agreements reshaping the global landscape, Bloomberg BNA offers a comprehensive tax research solution, wherever you focus your practice.

Bloomberg BNA is unique, pairing the proven expertise and perspective of leading tax practitioners with innovative tools so that you can be the best possible tax advisor to your clients or your company. Everything essential is brought together: comprehensive thought leadership from our renowned Tax Management Portfolios™, integrated news, in-depth analysis and insights, primary resources, practice tools, and more — all in a seamless, accessible interface that brings you the essential information you need, when you need it.

Make our expertise yours.

Offer your clients exceptional tax guidance by using the resources that only Bloomberg BNA can provide to stay ahead of the curve, make informed decisions, and transform challenges into opportunities.

We’ve set the standard. And raised the bar.

You can, too.

Only with Bloomberg BNA.
NEW LEVELS OF EXCELLENCE

FEDERAL
Bloomberg BNA Tax & Accounting provides trusted, detailed tax information enabling you to stay on top of the latest tax developments. Our expert-written collection of Tax Management Portfolios™, news, and analysis provides insights, explanations, and examples on every U.S. tax practice area. From our flagship Daily Tax Report® and the unrivaled Tax Management Weekly Report™, to Chart Builders and Navigators, get expert analysis on every issue, whether it’s income taxes and compensation planning or real estate and business entities.

INTERNATIONAL
Built on the foundation of our renowned Foreign Income Tax Management Portfolios, the Premier International Tax Library offers the unique combination of our in-country experts, in-depth analysis from leading outside practitioners, news, practice tools, and more. Plus, access the full text and summaries of tax treaties for more than 40 countries. Newly enhanced, this indispensable resource keeps you up to speed on the latest international tax developments.

STATE
Whether you have business operations in one state or every state, Bloomberg BNA provides the right solutions to help you understand the impact of state tax issues on your client or company, including our Premier State Tax Library and Individual State Tax Suites. Bloomberg BNA’s unique analysis and tools help you understand the tax treatment of everything from corporate income to real property across every state. You’ll find timely insight on emerging topics, such as the state tax treatment of digital property and online transactions, as those areas evolve.

ACCOUNTING
The Financial Accounting Resource Center™ is a comprehensive research service that provides current, unique, and intuitively organized material for your financial accounting research and reporting needs. You can now access Bloomberg BNA’s leading analysis, news, and tools, plus full text of the accounting standards and regulations, as well as guidance on the new revenue recognition standards, in one integrated and easy-to-use site, to make efficient use of your research time.

ESTATE TAX
Discover in-depth analysis and tools for developing and implementing the best estates and gifts strategies for your clients. From solutions to minimize costs to insight from leading estate tax experts, you’ll find a wealth of estate tax knowledge in Bloomberg BNA’s Estates, Gifts and Trusts Portfolios Library.

EVENTS AND TRAINING
Gain access to industry experts who provide intelligent analysis on corporate and personal tax & accounting topics. From local tax policy changes to wealth management, from transfer pricing to cross-border tax issues, get the information you need in the format you want: face-to-face, online, or OnDemand.

Explore all that Bloomberg BNA has to offer your practice.

CONFIDENCE. DELIVERED.
Special Consultant to Bloomberg BNA Tax & Accounting

Co-Author, *New York Sales and Use Taxes*, Sales and Use Tax Portfolio

**Career Milestones**
- Shareholder, Greenberg Traurig
- Former President, New York City Tax Commission
- Former President, New York City Tax Appeals Tribunal
- Former Deputy Commissioner, New York City Department of Finance, Audit and Enforcement
- Former Office of the Corporation Counsel of the City of New York, Tax and Bankruptcy Division
- Former Member, New York State and City Tax Departments, Commissioners’ Advisory Panels
- Chair, National Conference of State Tax Judges
- Chair, Association of the Bar of the City of New York, State and Local Tax Committee
- Member, New York State Bar Association Tax Sections SALT Committees
- Member, American Bar Association

**Education**
- J.D. Fordham University School of Law
- B.A. SUNY Albany

Bloomberg BNA

bna.com
**With our international inbound client base, I find the Bloomberg BNA Estate, Gifts and Trusts Library and U.S. International Portfolios Library to be absolutely essential in U.S. planning for foreign nationals. The research platforms and analyses are spot-on and always current.**

Robert Payne, Trust Business Development Director, Amicorp Services Ltd, Miami, FL
JEANELLE ALEMAR-ESCABÍ

Special Consultant to
Bloomberg BNA Tax & Accounting

Foreign Income Portfolio

Career Milestones
* Principal, JAE Legal Services LLC
* Former Ltd. Member, Pietrantoni, Méndez & Alvarez LLC
* Former Tax Advisor, Office of the Secretary of the Puerto Rico Treasury Department
* Certified Public Accountant
* Notary Public

Education
* LL.M. Taxation, Georgetown University Law Center
* J.D. University of Puerto Rico Law School
* B.A/B.S. Accounting & Finance, University of Puerto Rico Mayaguez (*Magna cum Laude*)
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“Whether it was for individuals or for trusts, the Bloomberg BNA Federal Tax Guide helped me sort through the Net Investment Income Tax IRC Sec 1411 so I was comfortable we were not overstating investment income and were taking advantage of all deductions available to reduce the tax.”

Janice L. Culver, CPA, Harlow & Ohmer LLC, Dayton, OH
Special Consultant to
Bloomberg BNA Tax & Accounting

Co-Author, *Business Operations in Norway*,
Foreign Income Portfolio

**Career Milestones**
- Partner, Advokatfirmaet Haavind AS
- Former Advokat and Senior Manager, KPMG Law Advokatfirma
- Ministry of Finance – Tax Law Department

**Education**
cand.jur. University of Oslo
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Special Consultant to
Bloomberg BNA Tax & Accounting

Author, *Business Operations in the Czech Republic*,
Foreign Income Portfolio

**Career Milestones**
- Attorney at Law/Tax Adviser, Rödl & Partner Vorlíková Tax s.r.o.,
  Part of Rödl & Partner Group
- Lecturer, Faculty of Law, Charles University of Prague
- Member, IFA (International Fiscal Association)
- Former Vice-Chairman and Secretary, IFA Czech branch

**Education**
- Master of Laws, Charles University, Prague
- Masters of European and International Taxation, Wirtschaftsuniversität, Austria
# April 2016 Calendar

**Sunday** | **Monday** | **Tuesday** | **Wednesday** | **Thursday** | **Friday** | **Saturday**
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"The Bloomberg BNA Tax Management Portfolios are, and have been, the very best topical resource for my tax research. Finding a Portfolio on point is like discovering a gold mine of useful information: you'll save hours of time and receive the comfort and satisfaction of knowing that you are now fully informed."

Ronald Lyster, Founder, Lyster, Inc., Los Angeles, CA

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**3**

- **Association to Advance Collegiate Schools of Business International Conference and Annual Meeting (AACSB ICAM)**

**4**

- **Association to Advance Collegiate Schools of Business International Conference and Annual Meeting (AACSB ICAM)**

**5**

- **Association to Advance Collegiate Schools of Business International Conference and Annual Meeting (AACSB ICAM)**

**6**

- **EFTPS**

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**11**

- **EFTPS**

**12**

- **EFTPS (Monthly/Nonpayroll)**

**13**

- **Council On State Taxation (COST) Spring Audit Session/Income Tax Conference**

**14**

- **Council On State Taxation (COST) Spring Audit Session/Income Tax Conference**

**15**

- **Council On State Taxation (COST) Spring Audit Session/Income Tax Conference**

**16**

- **Council On State Taxation (COST) Spring Audit Session/Income Tax Conference**

**17**

- **EFTPS**

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**20**

- **Bloomberg BNA Tax Advisory Board Meeting U.S. Income**

**21**

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**Note:**

- **EFTPS** indicates events related to the Electronic Funds Transfer Program (EFTPS).
- **Form 4070 (Mar. 2016)** refers to the official form used in tax-related transactions.
Special Consultant to Bloomberg BNA Tax & Accounting

Author, *Transfer Pricing: Rules and Practice in Selected Countries (Q-S), Foreign Income Portfolio*

**Career Milestones**
- Managing Partner, TAX EXPERT International Ltd.
- Former Partner-in-Charge of the Tax and Legal Department, Deloitte, Zurich
- Member, IFA (International Fiscal Association)
- Member, Kämbel
- Member, International Bar Association
- Member, American Bar Association
- Member, German Bar Association (DAI)
- Member, Expert Suisse Association
- Renowned author and lecturer domestically and abroad

**Education**
Certified Tax Expert
Certified Fiduciary
CERTIFIED FINANCIAL PLANNER™
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“I use the Bloomberg BNA Tax & Accounting Center to help answer the many questions that arise daily in the financial management of a $4 billion multinational manufacturing company.”

John Yonkin, VP Tax, Carlisle Corporation, Charlotte, NC
Special Consultant to Bloomberg BNA Tax & Accounting


**Career Milestones**

- Executive Director, Private Client Services, Ernst & Young LLP
- Adjunct Professor of Law, Georgetown University Law Center
- Former Attorney, Office of Chief Counsel, Internal Revenue Service
- Former Associate, Arnold & Porter LLP
- Former Tax Manager, Private Client Advisors, Deloitte Tax LLP
- CERTIFIED FINANCIAL PLANNER™
- Certified Public Accountant in the District of Columbia
- Member of the Bar, District of Columbia
- Member of the Bar, Pennsylvania

**Education**

- LL.M. Georgetown University Law Center
- J.D. University of Pittsburgh
- B.S Syracuse University
“Without any doubt, the most frequently used resource in our law library is the Bloomberg BNA Tax Management Portfolios.”

John Hightower, Librarian, Lanier Ford, Huntsville, AL
Special Consultant to
Bloomberg BNA Tax & Accounting

Author, Business Operations in Belgium, Foreign Income Portfolios

Career Milestones
- Partner, Liedekerke Wolters Waelbroeck Kirkpatrick
- Professor, Tax Law, University of Leuven (KU Leuven)
- Professor, Fiscale Hogeschool Brussels (FHS)

Education
- LL.M. New York University School of Law
- University of Leuven
- University of Michigan Law School
“When presented with a difficult tax question, the first resource I use is the Bloomberg BNA U.S. Income Portfolios Library. What I find most valuable is the analysis, examples, and easy access to forms, IRS code, regulations, and publications.”

Anna Marie Pogash-Pedorenko, Tax Manager, LCOR Inc., Berwyn, PA
DR. HERBERT BUZANICH

Special Consultant to Bloomberg BNA Tax & Accounting

Co-Author, Business Operations in Austria, Foreign Income Portfolio

Career Milestones

- Founding Partner, Aigner Buzanich Attorneys at Law
- Member, Austrian Bar Association and New York Bar Association

Education

LL.M. NYU (International Tax Program)
Dr.iur., Mag.iur. University of Vienna Law School

DR. MICHAEL SEDLACZEK

Special Consultant to Bloomberg BNA Tax & Accounting

Co-Author, Business Operations in Austria, Foreign Income Portfolio

Career Milestones

- Tax Partner, Freshfields Bruckhaus Deringer
- Member, Austrian Bar Association and Academy for Estate and Trust Law

Education

Dr.iur. University of Innsbruck
Mag.iur. University of Vienna

Bloomberg BNA

bna.com
### AUGUST

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"The Bloomberg BNA Estate, Gifts and Trusts Portfolios is an essential part of my estate tax practice."  
Robert Adams, Partner, Adams & Cramer, Shelbyville, IN
Special Consultant to Bloomberg BNA Tax & Accounting

Co-Author, ESOPs, U.S. Income Portfolio

Career Milestones
- Partner, McDermott Will & Emery
- Member, Texas State Bar Association
- Member, American Bar Association
- Legal Liaison, Valuation Advisory Committee the ESOP Association

Education
- LL.M. Georgetown University Law Center with distinction
- J.D. Texas Tech University *(magna cum laude)*
- B.A. The University of Dallas
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"The Bloomberg BNA Federal Tax Guide is twice as thick and 10 times as content rich as other quick reference tax guides that I have used over the past 40 years of professional accounting and tax practice."

George Prytula, III, CPA, Professional LLC, Heathrow, FL
PHILIPPE MALHERBE

Special Consultant to
Bloomberg BNA Tax & Accounting

Co-Author, *Business Operations in Belgium*, Foreign Income Portfolio

**Career Milestones**
- Partner, Liedekerke Wolters Waelbroeck Kirkpatrick
- Professor, Catholic University of Louvain (UCL)
- Professor, Ecole Supérieure des Sciences Fiscales (ESSF)

**Education**
- LL.M. University of California at Berkeley
- Law Degree University of Louvain (UCL)
- Economics Degree University of Louvain (UCL)
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“I really like the **Financial Accounting Resource Center.** The setup is very clean and it’s easy to navigate. It also includes additional accounting guidance in many areas that I find very useful. It will definitely save us a lot of time.”

John Vaillancourt, CPA, Global Controller, Charles River Development, Burlington, Massachusetts
Special Consultant to Bloomberg BNA Tax & Accounting

Co-Author, ESOPs, U.S. Income Portfolio

Career Milestones
- Partner, Holland & Knight
- Member, American Bar Association, Section of Taxation
- Member, American Bar Association, ESOP Subcommittee, Chair Emeritus
- Member, Employee-Owned S-Corporations of America
- Member, ESOP Association
- Member, International Pension and Employee Benefits Lawyers Association
- Member, National Center for Employee Ownership
- Member, Society of International Business Fellows
- Member, Union League Club of Chicago

Education
- J.D. University of Illinois
- B.S. University of Kentucky

GREGORY BROWN
bna.com
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**November**

“When I need serious explanation, The U.S. Income Series is the place to go. I consider Bloomberg BNA to be totally essential.”

Barbara J. Aue, Owner,
Barbara J. Aue CPA, Goleta, CA
Special Consultant to Bloomberg BNA Tax & Accounting

Co-Author, *U.S. Taxation of International Shipping and Air Transport Activities*, Foreign Income Portfolio

**Career Milestones**
- Managing Partner, Davies Ward Phillips & Vineberg LLP
- Vice President – Finance, IFA USA Branch
- Board Member, Alliance for Cancer Gene Therapy Inc.
- Advisory Board Member, Marketcore, Inc.
- Managing Partner, Davies Ward Phillips & Vineberg LLP
- Fellow, American College of Tax Counsel
- Board Member, Alliance for Cancer Gene Therapy Inc.
- Board of Advisors Member, Whitehead Institute for Bio Medical Research

**Education**
- J.D. Harvard Law School
- B.A. University of Wisconsin
“The Bloomberg BNA State Tax Nexus Tools are fast, convenient, comprehensive, and get us the answers we need without the $500-an-hour legal price tag.”

Anthony Nitsos, Chief Finance and Growth Specialist, Ascendeus