

*16th Annual*

# Maine

## TAX FORUM

**Augusta Civic Center**  
**Wednesday, November 7, 2012**  
**Thursday, November 8, 2012**  
**7:45 am - 4:30 pm**

**Who Should Attend?**

Tax Professionals, Accountants, Enrolled Agents, CPAs, Tax Attorneys, Financial Planners and others who need to keep informed of changing and existing tax laws. CPE and CLE credits are available.

**Professional Education Credits**

**17 hours of CPE credits (Board of Accountancy only)**

**12.55 hours of CLE credits (estimated, pending Board approval)**

**Fee**

**\$45 for each registrant/per day, includes tuition, refreshments and lunch. Payments are nonrefundable after September 17, 2012.**

**• • • NEW THIS YEAR • • •**

**Auditorium seating will be provided on a first come basis. Overflow capacity will be seated in the 2nd floor North Wing where the presentations will be projected on screen.**



# November 7: Maine Tax Forum

7:45 **REGISTRATION and COFFEE**

8:15 **Welcome and Announcements**

8:30 **Ethics**

This segment qualifies for professional responsibility credit

**William J. Schneider**  
Attorney General  
State of Maine

9:30 **FEDERAL Income Tax Developments: Federal Business and Individual Income Tax Developments**

**Moderator - Donna Ryan, CPA, JD**  
Baker Newman & Noyes, Portland, ME

**Christine B. Worthen, Esq.**  
Eastern Maine Healthcare Systems, Brewer, ME

**Daniel P. Doiron, CPA, CVA**  
Albin, Randall & Bennett, Portland, ME

**Kirk J. Purvis, CPA, CFE**  
Dawson Smith Purvis and Bassett, Portland, ME

**Paul J. Callnan, CPA**  
Chester M. Kearney, CPAs, Houlton, ME

10:00 **BREAK**

10:15 **Federal Income Tax Developments, continued**

12:00 **LUNCH**

1:00 **MAINE Income Tax Developments**

**Maine Estate Tax Changes**

**Elizabeth High, Esq.**  
LeBlanc & Young, Portland, ME

**2012 Maine Income Tax Changes**

**Peter Dufour, JD, CPA, MBA, Director**  
Macdonald Page & Co LLC, South Portland, ME

**2013 Maine Income Tax Changes**

**Lee J. Chick, CPA**  
BerryDunn, Bangor, ME

2:30 **BREAK**

2:50 **Federal / State Income Tax Case Law Developments**

**Scott Boak, Assistant Attorney General**  
Attorney General's Office, Augusta, ME

**Nelson A. Toner, Esq.**  
Bernstein Shur, Portland, ME

4:30 **CLOSE**

# November 8: Maine Tax Forum

7:45 **REGISTRATION and COFFEE**

8:30 **IRS Initiatives**

**Shawn S. Savage**, Sr. Stakeholder Liaison  
Internal Revenue Service

9:30 **NEW Office of Board of Tax Appeals and Taxpayer Advocate**

**To Be Announced**, Chief Appeals Officer **Jonathan A. Block**, Esq.  
Board of Tax Appeals, Augusta, Maine Pierce Atwood LLP, Portland, Maine

**Bruce Livingston**, Taxpayer Advocate **Michael Fortin**, Director, Compliance Division  
Maine Revenue Services, Augusta, Maine Maine Revenue Services, Augusta, Maine

10:00 **BREAK**

10:15 **Office of Board of Tax Appeals and Taxpayer Advocate, continued**

11:00 **Audit Updates**

**John Lewandowski**, Director, Audit Division **Judy A. Methot**, Deputy Director, Audit Division  
Maine Revenue Services, Augusta, Maine Maine Revenue Services, Augusta, Maine

12:00 **LUNCH**

1:00 **Sales Tax Updates**

**Peter B. Beaulieu**, Director, Sales, Fuel and Special Tax Division  
Maine Revenue Services, Augusta, Maine

2:30 **BREAK**

2:50 **Maine Business Tax Incentives**

**Robert J. Crawford**, Esq. **Shana Cook Mueller**, Esq. **N. Joel Moser**, Esq.  
Bernstein Shur, Portland, Maine

4:30 **CLOSE**

**For information,  
call or write:**

**Maine Revenue Services**  
P.O. Box 9107  
Augusta, ME 04332-9107

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