

## TAX UPDATE SEMINAR

Friday, January 6, 2012— 8:00 AM - 12:00 PM  
Fox Hollow Caterers, 7725 Jericho Turnpike, Woodbury, NY 11797

### Agenda to Include

#### ► Federal and New York State Tax Updates

##### **Presentation by Warren M. Bergstein, CPA, AEP and Jack E. Gold, CPA; Partners, Adelman Katz & Mond LLP**

Mr. Bergstein has more than thirty-five years of practice in tax planning, estate planning, personal financial planning and accounting which has given him an extraordinarily deep understanding of personal finance. Mr. Bergstein is an adjunct professor of accounting and taxation at Long Island University and has also taught at New York University.

Mr. Gold is the Audit & Technology Partner with Adelman Katz & Mond LLP. One of his specialties is designing and implementing technology systems that save money while making it easier to track and analyze information.

Their presentation will include:

- ◆ Federal Tax Update for individual and business owners;
- ◆ Strategies and planning for 2012 and beyond for individuals, estates and trusts, and small businesses;
- ◆ New York State and City tax update—new rates, residency and domicile issues, tax credits.

#### ► Financial and Tax Issues, New Rules and Changes Ahead

##### **Presentation by Karen A. Goldberg, CPA; Sanders Thaler & Associates LLP**

Ms. Goldberg is a Tax Manager at Sanders Thaler & Associates, LLP, she is responsible for the day-to-day operations of the Tax Department and clientele spanning a diverse portfolio of businesses and individuals, helping them minimize and plan for their tax liabilities.

Her presentation will include:

- ◆ Financial and Tax Issues Facing Same-Sex Couples;
- ◆ New Rules Going Into Effect Re: Cost Basis Reporting for Investments; and
- ◆ Rules for Paid Preparers of Tax Returns—Changes Ahead.

*Tuition Includes: 3 CFP® (pending approval) and/or CPA Continuing Education Credits,  
A delicious full breakfast from 8:00 AM to 8:30 AM and Networking Opportunities!*

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Represented by Carrie Short

Booth Sponsor: The Hartford

### January 6, 2012 — TAX UPDATE SEMINAR REGISTRATION FORM

Registration Fee Paid on or before Dec. 31st: FPA of LI MEMBERS: \$40.00      ALL OTHERS: \$75.00

**Registration Fee Paid after Dec. 31st:**    FPA of LI MEMBERS: \$60.00      ALL OTHERS: \$95.00

NAME: \_\_\_\_\_

EMAIL: \_\_\_\_\_ (to confirm your registration)

CFP® # \_\_\_\_\_ CPA# \_\_\_\_\_ FPA Member # \_\_\_\_\_ /Non-Member \_\_\_\_\_

Needed to electronically file your CE Credits

**To register, please mail this form with your check made payable to  
Financial Planning Association of Long Island**

Send to: FPA of Long Island, 1895 Lincoln Ave., East Meadow, NY 11554-2522

*If you cannot keep your commitment, please call 516-542-2004 to cancel your registration.*

**No shows and those who fail to cancel 24 hours prior to the meeting will be invoiced the set fee.**