

About PTI

All PTI conferences are the direct result of a collaborative effort of CPAs, EAs, attorneys and public accountants actively engaged in the areas of income and estate taxation.

We sincerely believe the "Practitioner to Practitioner" approach is the most effective way to provide quality CPE.

CONFERENCE MATERIALS

All "In Person" conference attendees will receive our 2021 federal tax workbooks and additional conference materials. "In Person" attendees also receive our "PTI Quick Reference Chart", as well as online access to updated workbook text and late year law changes – tools you will find indispensable at your desk.

Webinar conference attendees will receive electronic versions of the 2021 federal tax workbook and additional conference materials. "Webinar" attendees will also have online access to updated workbook text and late year law changes. Hard copies of the workbook and Quick Reference Chart are available for an additional fee.

Registration Information

Who May Enroll

Enrollment is open to all CPAs, EAs, attorneys, accountants, CLUs, trust officers, and other tax professionals regardless of years in practice or experience level.

INFORMATION FOR REGISTRANTS

Cancellations more than 30 days in advance will receive a refund of 75%. Cancellations 10 – 30 days prior to the conference will receive a refund of 50%. Cancellations less than 10 days prior to the conference will receive a refund of 25%.

The content of the 1040 continuing education conferences include both tax law update and accounting issues. The conferences are prepared as an update to improve taxation skills for attendees with basic to advanced technical knowledge. The teaching method used in the course is the "group-live" format. Prerequisites for the 16 CPE credit hour course are a basic working knowledge in the areas of taxation and accounting.

Stay Connected



www.ptitax.com

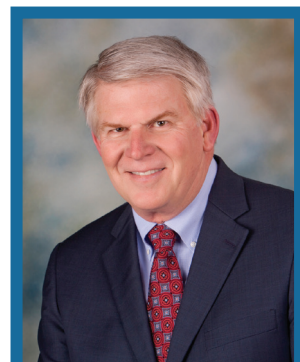


Professional Tax Institutes, Inc

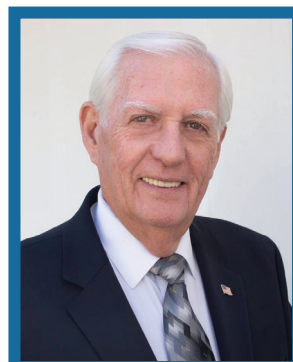
Meet the PTI Team

MEET THE PTI SPEAKERS

PTI Conference speakers present our diverse subject matter in an informative, entertaining manner. If you are tired of presenters that merely read out of the book, then PTI is for you! With our extensive tax practice experience, we truly understand practitioners' needs when it comes to continuing education.



RANDALL R. CARLSON, EA
Clay Center, KS



PAUL C. BUMGARNER, EA
Charlotte, NC



FRANCES COET, CPA
Spanish Fort, AL



RONALD D. POWELL, EA
Ocean Isle Beach, NC



ANGELA R. KIDD, CPA
Naples, FL

Professional Tax Institutes, Inc. (PTI) is registered with the Return Preparer Office, Internal Revenue Service, as a provider of continuing professional education for those individuals who are subject to the requirements of Title 31 Code of Federal Regulations, Subtitle A, Part 10. This agreement does not constitute an endorsement by the Internal Revenue Service. Complaints regarding registered sponsors may be submitted to the Return Preparer Office using IRS Form 14360. Sponsor Number: 0FY01.

Professional Tax Institutes, Inc. is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Please contact your state board if you have any questions about course eligibility and CPE. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org. Sponsor Number: 103026.

With 800 contact minutes over the conference period, CPE credits are recommended for 16 hours in the field of taxation and/or ethics.

CPE CREDITS



IRS-APPROVED CONTINUING EDUCATION PROVIDER



PRSR STD
U.S. POSTAGE
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MANHATTAN, KS

Address Service Requested

Professional Tax Institutes, Inc.
P.O. Box 77
Clay Center, KS 67432

Helping You Travel through the Tax Season

pti Tax Conferences

Serving Tax Professionals for 43 Years.

PROFESSIONAL TAX INSTITUTES, INC.
VOLUME 43 NUMBER 1

'21 '22

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WEBINARS

Webinar #1
Nov. 1 – 4, 2021
 Time - 1 – 5 pm Eastern each day
 Fees - \$360.00

Webinar #2
Dec. 7 – 8, 2021
 Time - 8 – 5 pm Eastern each day
 Fees - \$360.00

Registration online at www.ptitax.com.

WEST VIRGINIA

Charleston, WV #4
Nov. 11 & 12, 2021
 Hotel - Embassy Suites
 300 Court St.
 Charleston, WV 25301

Reserve - (800) EMBASSY
 Rates - \$139.00 + tax
 Room Rate Cut-off Date: Oct. 27, 5pm CST

Reference "PTI" when making room reserv.
 Fees - \$400.00 received by Oct. 25
 \$440.00 received after Oct. 25

SOUTH CAROLINA

Myrtle Beach, SC #6
Nov. 18 & 19, 2021
 Hotel - Ocean Reef A Seaside Resort
 7100 N Ocean Blvd.
 Myrtle Beach, SC 29572

Reserve - (855) 842-6556
 Rates - \$64.00 - \$84.00 + tax + resort fee
 Room Rate Cut-off Date: Oct. 15

Group ID: "PROTAX21 at Ocean Reef Resort"
 Fees - \$400.00 received by Oct. 31
 \$440.00 received after Oct. 31

HAWAII

Kahului, HI #10
Jan. 4 & 5, 2022
 Hotel - Maui Beach Hotel
 170 Kaahumanu Ave.
 Kahului, HI 96732

Reserve - (808) 877-0051
Registration and information contact:
 Marilyn M. Niwao, M.S.P.H., J.D.,
 CPA, CGMA, ATA
 Niwao & Roberts, CPAs, a P.C.
 2145 Wells Street, Suite 402
 Wailuku, HI 96793
 Phone - (808) 242-4600 ext. 224
 Fax - (808) 242-4607

\$40 Early Bird Discount
if Registered by August 31 for Live Seminars

2021-2022 Conference Topics

- American Rescue Plan Act
- Updated Dependent Credits
- Selected Trust Topics
- Consolidated Appropriations Act
- Ethics in Practice
- Handling Financial Distress
- Client IRS Representation
- Small Business Credits
- New Developments
- Schedule C
- New Tax Law Provisions
- Rulings & Court Cases
- Transferring Business Ownership
- MFS or MFJ, Which one?
- Agriculture Issues

OHIO

Perrysburg, OH #1
Nov. 8 & 9, 2021
 Hotel - Holiday Inn & Suites
 27355 Carronade Drive
 Perrysburg, OH 43551

Reserve - (567) 331-8900
 Rates - \$119.00 + tax
 Room Rate Cut-off Date: Oct. 18

Reference "PTI" when making room reserv.
 Fees - \$400.00 received by Oct. 25
 \$440.00 received after Oct. 25

NORTH CAROLINA

Greensboro, NC #5
Nov. 16 & 17, 2021
 Hotel - Sheraton Four Seasons
 3121 West Gate City Blvd.
 Greensboro, NC 27407

Reserve - (800) 242-6556
 Rates - \$149.00 + tax
 Room Rate Cut-off Date: Oct. 18, 6pm EST

Reference "Professional Tax Inst. Nov. 2021" when making room reservations
 Fees - \$400.00 received by Oct. 31
 \$440.00 received after Oct. 31

FLORIDA

Ft. Myers, FL #7
Nov. 29 & 30, 2021
 Hotel - Hilton Garden Inn at Airport
 16410 Corporate Commerce Way
 Fort Myers, FL 33913

Reserve - (239) 210-7200 or (800) HILTONS
 Rates - \$105.00 + tax
 Room Rate Cut-off Date: Oct. 29

Use group code: "PTI" when making room reserv.
 Fees - \$400.00 received by Nov. 14
 \$440.00 received after Nov. 14

Hilo, HI #11

Jan. 5 & 6, 2022
 Hotel - Hilo Hawaiian Hotel
 71 Banyan Drive
 Hilo, Hawaii 96720
 (808) 935-9361

Reserve - (808) 935-9361
Registration and information contact:
 Valerie Peralto, CPA
 Peralto & Co. CPAs Inc. PC
 180 Kinoole Street, Suite 302
 Hilo, HI 96720
 Phone - (808) 961-3462
 Fax - (808) 961-3571

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Oct. 31, 2021	Nov. 1	Nov. 2	Nov. 3	Nov. 4	Nov. 5	Nov. 6
	Webinar 1-5p Eastern					
Nov. 7	Nov. 8	Nov. 9	Nov. 10	Nov. 11	Nov. 12	Nov. 13
	Perrysburg, OH			Charleston, WV		
		Sandusky, OH				
			Cuyahoga Falls, OH			
Nov. 14	Nov. 15	Nov. 16	Nov. 17	Nov. 18	Nov. 19	Nov. 20
		Greensboro, NC		Myrtle Beach, SC		
Nov. 21	Nov. 22	Nov. 23	Nov. 24	Nov. 25	Nov. 26	Nov. 27
				Thanksgiving		
Nov. 28	Nov. 29	Nov. 30	Dec. 1	Dec. 2	Dec. 3	Dec. 4
	Ft. Myers, FL					
		Orlando, FL			Nashville, TN	
Dec. 5	Dec. 6	Dec. 7	Dec. 8	Dec. 9	Dec. 10	Dec. 11
		Webinar 8a-5p Eastern				
Jan. 2, 2022	Jan. 3	Jan. 4	Jan. 5	Jan. 6	Jan. 7	Jan. 8
		Kahului, Maui, HI				
			Hilo, HI			
				Honolulu, Oahu, HI		

ATTENTION
 Hotel sleeping rooms rates are only guaranteed until the date listed. We suggest you make your hotel reservations as soon as possible to guarantee the availability of the posted rate.

Please check the PTI website (www.ptitax.com) for a list of hotels and updates on hotels secured near the location of your choice.



Orlando, FL #8

Nov. 30 & Dec. 1, 2021
 Hotel - Hilton Orlando/Altamonte Springs
 350 S. Northlake Blvd
 Altamonte Springs, FL 32701

Reserve - (800) 678-4380
 Rates - \$119.00 + tax
 Room Rate Cut-off Date: Nov. 1

Reference Corporate Code: 2538741
 Fees - \$400.00 received by Nov. 14
 \$440.00 received after Nov. 14

Honolulu, HI #12

Jan. 6 & 7, 2022
 Hotel - Pagoda Hotel
 1525 Rycroft Street
 Honolulu, HI 96814

Reserve - (808) 954-7453
Registration and information contact:
 Eric Matsuda
 1481 S King Street, Suite 540
 Honolulu, HI 96814
 PH: (808) 949-7651
 FAX: (808) 947-2723

TENNESSEE

Nashville, TN #9
Dec. 2 & 3, 2021
 Hotel - Embassy Suites Airport
 10 Century Blvd.
 Nashville, TN 67214

Reserve - (800) EMBASSY
 Rates - \$149.00 + tax
 Room Rate Cut-off Date: Nov. 1

Reference "PTI" when making room reserv.
 Fees - \$400.00 received by Nov. 14
 \$440.00 received after Nov. 14



PTI CONFERENCE REGISTRATION
REGISTER ONLINE TODAY @ www.ptitax.com

Do Not Send This Form if Registering ONLINE
Send Separate Form For Each Attendee

Full Name: _____
 Firm Name: _____
 Mailing Address: _____
 City: _____ State/Province: _____
 Zip/Postal Code: _____
 Telephone: () _____
 Email: _____

CPA EA Other: _____
 PTIN: _____

Please Register Me in Conference Number: _____
 Conference City Location: _____

Conference Fee: \$400.00
 Late Registration Fee After 2-week cut off date: **\$40** (+) _____
 Early Bird Discount: **(If received by 8/31 \$40)** (-) _____
 Paper registration Handling Fee: (+) **\$10.00**
Total: \$ _____

Preferred method of payment: _____ Mail to: Professional Tax Institutes, Inc.
 P.O. Box 77
 Clay Center, KS 67432

Check enclosed to cover the full fee
Make checks payable to: PTI, Inc.

CVV - REQUIRED:

Charge to: VISA Mastercard American Express Discover

Account Number exp

Cardholder (print): _____
 Authorized Signature: _____