

**PHILADELPHIA TRI-COUNTY CHAPTER**  
PA: PX-000501L , NJ: 20CE00159200, NY: 002280, IRS: E3S5R

**Philadelphia & Local Tax Update**  
**Tuesday, January 10, 2017**

**Springfield Country Club**  
400 W. Sproul Road (RTE 320)  
Springfield, PA 19064  
610-690-7600

Registration: 2:30—3:00 PM  
CPE: 3:00—6:30 PM  
Dinner: 6:30 PM

**CPE Credits - 4 Hours Non-Federal Tax**

**SPEAKERS:** Philadelphia Department of Revenue Panel and local tax panel  
including representatives from Berkheimer and Keystone  
*Topics to be covered listed on reverse side*

ALL ATTENDEES MUST BE PRE-REGISTERED BY January 8, 2017 OR MEAL IS NOT GUARANTEED.

Dinner Selections: \_\_\_\_ London Broil \_\_\_\_ Broiled Flounder

Name: \_\_\_\_\_ ID # \_\_\_\_\_ PTIN # \_\_\_\_\_

Street Address: \_\_\_\_\_  
(See Mailing Label)  
City/State/Zip \_\_\_\_\_

Email Address: \_\_\_\_\_ Phone: (\_\_\_\_) \_\_\_\_\_ Fax: (\_\_\_\_) \_\_\_\_\_

☐ PSTAP Member: \$50

☐ CPE only Member: \$35

☐ PSTAP Non-Member: \$60

☐ CPE Only Non-Member: \$45

☐ Check made payable to: Philadelphia Tri-County Chapter is enclosed.\*\*

☐ Credit Card: \_\_\_\_ MC \_\_\_\_ Visa Acct # \_\_\_\_\_ Exp: \_\_\_\_\_  
Signature: \_\_\_\_\_ CVV#: \_\_\_\_\_ (on back)

**MAIL Form To:** PSTAP Executive Office Attn: Philadelphia Chapter Meeting  
20 Erford Road, Suite 200A, Lemoyne, PA 17043  
FAX: 717-737-6847 Questions?: **215-339-0300 (Joe Ianni)**  
Questions? 1-800-270-3352 Register online [www.pstapcpe.com](http://www.pstapcpe.com)

- \*\*EACH SEMINAR OR MEETING REGISTRATION REQUIRES A SEPARATE FORM AND CHECK
- IF CHECK IS NOT RECEIVED WITHIN 7 DAYS OF EVENT, A LATE FEE OF \$10.00 MAY BE REQUIRED
- NO SHOWS ARE INELIGIBLE FOR REFUNDS/ALL TOPICS ARE SUBJECT TO CHANGE

# Philadelphia & Local Tax Update:

## **3:00—5:00 PM Panel of City of Philadelphia Department of Revenue Representatives:**

- About the Department of Revenue— Deputy Commissioner for Operations, Dave Dorman
- Tax Policy & Administration Update -- Diane Evanitsky, Tax & Revenue Conferee and Tom Wismer, Director of Accounting
- Philadelphia Beverage Tax 101 with Q&A – Tilahun Afessa, Director of Policy
- Collections and Compliance – Deputy Commissioner for Collections, Marco Muniz
- Customer Service Panel/Q&A-- Moderator – Deputy Commissioner Dave Dorman, Participants: All presenters + Charliane Daniels (Director of Taxpayer Services).

## **5:00—5:30 PM Local Tax Update:**

*Speakers: JIM HUNT, Berkheimer Associates, Director of Governmental Relations and ROSE HARR, Keystone Collections Group, VP Client Relations*

- Unless rescinded by New Jersey, the effect of the cancelation of the NJ/PA Reciprocal Agreement on Philadelphia residents and employers, both New Jersey with Philadelphia employees and Philadelphia with New Jersey employees
- New Jersey Reciprocal Agreement effect on local tax credits (unless rescinded)

## **5:30—6:30 PM Local Tax Legislative Update:**

*Speakers: David Caplan, CPA and James Newhard, CPA*

- PA House Bill 245 Amending the Local Tax Enabling Act
- IRRC Submits Comments to Act 32 Proposed Rulemaking
- PA House Testimony on Philadelphia “Super Credit”
- PA EIT: EXCLUSIONS FROM TAXABLE EARNINGS