American Association of Attorney-Certified Public Accountants

2011 Southwest Regional Education Conference

Barton Creek Resort & Spa
8212 Barton Club Drive
Austin, TX 78735

January 21-23, 2011

BARTON CREEK
RESORT & SPA
Extraordinarily Austin

Co-Sponsored by:
Arizona Chapter of the AAA-CPA
Bernstein Global Wealth Management Group
Capstone Associated Services, Ltd.
California Association of Attorney-CPAs
North Texas Chapter of the AAA-CPA
South Texas Chapter of the AAA-CPA

What better way to relax ahead of the busy tax season than a weekend getaway to the AAA-Four Diamond Barton Creek Resort & Spa? The AAA-CPA invites you to attend the 2011 Southwest Regional Education Conference, January 21-23, 2011. Barton Creek features some of the region's most beautiful views while also boasting the number 1 and 2 ranked golf courses in Texas.

Don't miss out on the many networking opportunities or education sessions. This program will provide up to **7.5 hours of CPE** and CLE/MCLE on a 50-minute hour track and **6.25 hours of CLE/MCLE** on a 60-minute hour track. Attorney-CPAs; both members and non-members are encouraged to attend and bring their families.

Barton Creek is centrally located 18 miles from Austin Bergstrom International airport making it accessible to all those on the West Coast. Southwest Airlines, an AAA-CPA preferred airline is currently offering reduced fares from many cities on the East and West Coast. It is also easily accessible via driving from Houston (Three and a 1/2 hours), San Antonio (1 Hour and a 1/2), and Dallas (4 Hours). We also encourage you to bring your families and guests and enjoy all that the resort has to offer. Barton Creek has a full service spa, indoor and outdoor pools, miniature golf course, children's programs and much more. The hotel is able to guarantee our group rate for 3 days pre and post should you wish to extend your time and make a vacation out of it!

Conference Schedule & Registration Information

Friday, January 21	Saturday, January 22
12:00 PM — 5:00 PM Registration	7:45 AM — 9:00 AM Breakfast
1:30 PM — 5:00 PM Education	9:00 AM — 12:05 PM Education
5:30 PM — 7:00 PM Networking Reception	12:05– 1:30pm Lunch
Dinner on your own	

	Member & Non-Member
Full Package Includes 7.5 hours of education, education materials, 1 breakfast, breaks, 1 lunch and Networking Reception	$225
Spouse/Guest Ticket- Includes 1 Breakfast, Networking Reception	$75
Children- Includes 1 Breakfast, Networking Reception	$30
**All packages can be pro-rated for individual events.*	

Education Speakers & Topics (CPE/ CLE/MCLE)

Friday, January 21st

1:30 PM - 2:20 PM (50)
William Hornberger, Esq., LL.M, CPA and Steven Moore, Esq., Jackson Walker, L.L.P.
Margin Tax
This Texas franchise tax presentation will provide a transactional approach to analyzing the impact of the Texas margin tax including a review and comparison of state vs. federal tax treatment of certain common business structures. The presentation will also provide current information on legislation pending or likely to be filed in the 2011 Texas Legislative Session.

2:20 PM - 3:10 PM (50)
Cory Dowell, CFP
Bernstein Wealth Management Group
Roth IRA Conversions
The Roth IRA is arguably the most powerful retirement and estate planning tool available. Those who have enough wealth in their personal accounts to pay the taxes on the conversion and still have sufficient assets to delay drawing from their IRA until late in retirement will clearly benefit from converting. In particular, future generations will be far better off inheriting a tax-free Roth than either taxable assets or a traditional IRA. This session will explore the particular income and estate tax planning considerations particular to this strategy.

3:10 PM - 3:20 PM *Break*

3:20 PM - 4:10 PM (50)
Alvin Golden, Esq., CPA, Ikard & Golden, P.C.
Estate Tax Update
This program will discuss the latest changes based on Congressional decisions that will change future estate planning.

4:10 PM - 5:00 PM (50)
Howard Bernstein, Esq., CPA
Howard O. Bernstein, P.C.
William T. (Tommy) Simmons, Esq.,
Texas Workforce Commission
Workforce Commission

Recent trends in federal and state compliance concerning classification of workers. The session addresses the current environment of increased investigation and penalties for misclassifying workers and will cover proposed legislation.

5:30 PM - 7:00 PM *Networking Reception*

Thank you to our Sponsors

Education **AAA-CPA Gold Partner**

Bernstein Global Wealth Management
A unit of AllianceBernstein L.P.

Capstone Associated
Captive Insurance Planning for the Middle Market

Saturday, January 22nd

7:45 AM - 9:00 AM *Breakfast Buffet*

9:00 AM - 11:05 AM (125)
Adrian Van Zelfen, Esq., CPA, The CPA-Team
Tax Roundtable Discussion

Audience participation on any and all Federal Income Tax and tax practice related issues. What have you learned recently that is of value or benefit to the rest of us? Is there something with which you are currently dealing, for which you would gain from the group's collective wisdom; this is your chance to ask.

11:05 AM - 11:15 AM *Break*

11:15 AM - 12:05 PM (50)
Joan Conway Waller, Esq., Secore & Waller, L.L.P.
Dodd-Frank in One Minute or Less

This presentation will center on the Dodd-Frank provisions that are likely to directly affect investment advisers or sponsors of securities offerings, and the lawyers and accountants who advise them. Discussion will involve the change in the regulation of investment advisers as well as some related investor protection provisions and the provisions that affect private placements of securities.

12:05 PM - 1:30 PM *Lunch Buffet*

Faculty

Howard Bernstein, Esq., CPA, based in Boulder, Colorado, has 30 years of experience in law, corporate financial management, auditing, accounting, financial analysis, sales, personnel recruiting, and management consulting. He works primarily with small and mid-sized companies. His employment law practice focuses on proper classification of workers as well as litigating employment disputes. Howard practices before the U.S. Tax Court , has testified as an expert witness regarding matters of federal, state and international taxation and often lectures on matters involving employment law, taxation, and legal ethics.

Cory Dowell , CFP, a Director in Bernstein's Wealth Management Group, advises clients and their professional advisors regarding taxation, estate planning, risk management, business transactions, investment objectives and charitable giving plans. Previously, Cory was a senior investment consultant at Fidelity Investments for eight years. He has advised some of the largest corporations in the world on their equity compensation, retirement plans and investment options.

Alvin Golden, Esq., CPA, has extensive speaking in estate planning, community property law and employee benefits areas, including programs for State Bar of Texas, American College of Trust and Estate Counsel, International Academy of Estate and Trust Law, American Bar Association and the Texas Society of Certified Public Accountants. He is active in the legislative activities for the Real Estate, Probate & Trust Law Section and the Texas Academy of Probate Lawyers and has published articles in Estate Planning Magazine, the ACTEC Journal, Trusts and Estates Magazine, and Texas Tech Estate Planning and Community Property Law Journal.

William Hornberger, Esq., LL.M., CPA, tax practice emphasizes transactional and international tax matters and tax controversy issues. Willie is a member of the Dallas Bar Association, the Texas Bar Association, the American Bar Association, and the Texas Society of Certified Public Accountants. Willie served as the 2008-2009 Chair of the Dallas CPA Society, the 2005 Chair of the Section of Taxation of the Dallas Bar Association and the 2001-02 Chair of the Section of Taxation of the State Bar of Texas and the 2008 Executive Committee of The Real Estate Council. He currently serves as a member of the Executive Board and the board of directors of the Texas Society of CPAs. He has served as an Adjunct Professor in Taxation at the SMU Law School. Willie is a frequent speaker and author on both domestic and international tax topics and he has been listed in *"Best Lawyers in America"* under Tax Law since 2003.

Steven Moore, Esq., practice includes planning and controversy work emphasizing sales tax, Texas franchise (aka "margin") tax, and insurance premium tax. Steven has extensive experience in state tax planning for multi-state business models, and regularly provides tax strategy advice relating to business acquisitions and divestitures. He is one of the state's leading attorneys for guidance on the new Texas margin tax and he frequently speaks on this topic, with ongoing commitments for presentations to Texas State Bar and University of Texas CLE programs. Steve has made numerous speaking presentations to major CLE programs across Texas dealing with various state tax and corporate topics, including "The New Texas Margin Tax."

William T. (Tommy) Simmons, Esq., serves as legal counsel for Chairman Tom Pauken, the Commissioner representing employers at the Texas Workforce Commission. He is the author of the book Especially for Texas Employers and the editor of the Employment Law Handbook of the Texas Association of Business.

Adrian Van Zelfen, Esq., CPA, helps business owners and owners of professional practices. He has written numerous training books on how to succeed in business and master the money game as well as work with the IRS. He is a magna cum laude college graduate and a former USAF Captain.

Joan Conway Waller, Esq., is a partner with Secore & Waller, L.L.P., in Dallas, TX. Jo advises clients on a variety of securities law issues, ranging from offerings of securities to corporate governance and regulatory compliance. The firm represents clients in securities law-related matters, including private placements of securities, registration and licensing of investment advisers and broker/dealers, securities reporting requirements, internal investigations, representation in regulatory investigations or proceedings, and defense of enforcement actions instituted by federal and state securities regulators or self-regulatory organizations.

Meeting Information

Hotel Reservations:
The AAA-CPA has secured a limited amount of rooms (25) at the Barton Creek Resort for the evenings of Friday, January 21st and Saturday, January 22nd. Rates are $201.65 single/double including resort fee*. Reservations can be made by calling Barton Creek reservations directly at (800) 604-6563. **Reservations must be made by Friday, January 7, 2011** in order to guarantee our group rate. This rate will be available 3 days pre/post for those wishing to extend their travel. When making reservations, please mention that you are with the AAA-CPA.

**Resort fee includes: toll-free & credit card calls, fitness center, in-room coffee, daily newspaper, self parking, miniature golf, and gratuities for golf bag handling and housekeeping.*

Cancellation Policy:
A $50.00 processing fee will be charged for all cancellations after January 14, 2011. Refunds will be by check only.

CPE & CLE/MCLE:
This program will provide up to 7.5 hours of CPE and CLE/MCLE on a 50-minute hour track and 6.25 hours of CLE/MCLE on a 60-minute hour track. Attorney-CPAs; both members and non-members are encouraged to attend.

Travel:
Barton Creek Resort and Spa is located 18 miles from Austin Bergstrom International. Ground Transportation to and from the hotel is available by shuttle, taxi or rental car.

The resort offers airport transfers for $43.00 per person each way. Please contact the resort to make your reservations.

On-site parking is complimentary.

Preferred Airline:
The AAA-CPA is now a business partner with Southwest Airlines. To make a reservation, visit www.swabiz.com and select Book Air. Enter **Company ID: 99138480** and begin booking—it's that easy! Be sure to set up a Traveler account.

Golf:
Barton Creek offers 4 championship courses that will test an experienced players skills and offer a challenge to those less experienced. During the meeting golf rates are as follows:

Crenshaw Course: $135/ Fazio Courses: $195

Rates above include greens fees, range balls and golf cart. Rental clubs are available at an additional cost of $75. To reserve a tee time, please call (512) 329-4000 and ask to speak to the pro shop.

Spa:
Barton Creek has a full service spa and salon located on the premises offering massage, facials, manicure,, and pedicure all in a newly remodeled setting. The spa also features a full service boutique. Treatments can be reserved ahead of time by calling direct at (512) 329-4550.

Southwest Regional Conference Registration Form

__ I would like to Register for the Southwest Regional Education Conference __ I would like to reserve my hotel room

Name: ______________________________ Guest Name: ______________________________

Address: ______________________________ City: ____________ ST: ______ Zip: __________

Phone: ______________________________ Fax: ______________________________

Email: ______________________________ Guest Email: ______________________________

Please make my reservations for:

__ Checking in on January 21, 2011 and checking out on January 23, 2011

__ Checking in on January _____, 2011 and checking out on January _____, 2011

Room Preference: ________ Single ________ Double

Member & Non-Member Registration Fee ……………………………………………………$225.00

Guest Fee ……………………………………………………………………………$75.00

Children's Fee ………………………………………………………………………...$30.00

Hotel Deposit …………………………………………………………………………$201.65

Total Amount……………………………………………………………………………$______

Payment Information *(credit card payments only if reserving hotel)*

__ MasterCard __ Visa __ American Express __ Check *(payable to the AAA-CPA)*

Credit Card Number ______________________________ Exp. Date ______________

Name as it appears on card______________________________ Signature______________________________

American Association of Attorney-Certified Public Accountants
3921 Old Lee Highway, Suite 71A
Fairfax, Virginia 22030

***THREE* Ways to Register:**

ONLINE: www.attorney-cpa.com
FAX: **888-272-2889**
MAIL: **AAA-CPA**
3921 Old Lee Highway, Suite 71A
Fairfax, VA 22030

Questions? Call - 888-ATTY-CPA
(888-288-9272)