

**FOURTEENTH ANNUAL**  
**TAX INSTITUTE**  
**FOR**  
**COLLEGES AND UNIVERSITIES**

**- TIFCU 2007 -**

**May 20, 21, and 22, 2007**



**PRESENTED BY INDIANA UNIVERSITY**  
**TO REGISTER - SEE THE FORM AT THE END OF THIS BROCHURE**

**LOCATION: THE UNIVERSITY PLACE CONFERENCE CENTER AND HOTEL**  
**AT 850 WEST MICHIGAN STREET, INDIANAPOLIS, INDIANA 46202**  
**CONFERENCE CENTER TELEPHONE 317-274-3876 AND FAX 317-274-3878**  
**HOTEL TELEPHONE 317-269-9000 AND FAX 317-231-5168**

**18 HOURS OF CPE CREDITS, INCLUDING, 2 HOURS OF ACCOUNTING/  
AUDITING CREDITS**  
**OR CLE CREDITS BASED ON A 50-MINUTE-HOUR STANDARD**  
**AND 15 HOURS OF CREDITS BASED ON A 60-MINUTE-HOUR STANDARD**  
**IN 2 DAYS**

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TAX INSTITUTE FOR COLLEGES AND UNIVERSITIES  
- TIFCU 2007 -  
May 20, 21, and 22, 2007

**Dear Friends And Colleagues:**

TIFCUs are primarily concerned with recent federal tax legislation, federal court decisions, U.S. Treasury Department regulations, and Internal Revenue Service rulings, procedures, and other pronouncements, including current and emerging tax compliance and other business administration issues, which significantly affect colleges and universities and the administrators thereof.

TIFCU 2007 will be held at the University Place Conference Center And Hotel on the Indianapolis campus of Indiana University during the period beginning Sunday, May 20, 2007 at 2:00 p.m. (if you wish to register then); or at 4:00 p.m. (if you wish to have a light buffet supper with us, the cost of which is included in your institute registration fee); or at 5:50 p.m. (if you only wish to attend the evening speaker sessions) through Tuesday, May 22, 2007 at 3:00 p.m. The delivery method for all TIFCU 2007 sessions are "group/live", as defined by NASBA.

We hope that you will join us and the other 250 to 300 college and university tax professionals who annually attend TIFCU, from all 50 states, the District of Columbia, and Puerto Rico, and who enjoy exchanging professional ideas with and socializing with each other and with our faculty in order to make TIFCU the premier college and university tax institute in the nation.

Best wishes,

*Larry*

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## TIFCU 2007 PROGRAM - SUNDAY, MAY 20, 2007

### Sunday Afternoon And Evening, May 20, 2007 Schedule

- 2:00 p.m. - **Registration And Distribution Of Materials**  
8:00 p.m. The registration and information desk is open for new registrations and distribution of materials. In general, one or both of the following individuals will be at this desk in order to provide services to you throughout TIFCU 2007: **Sue E. Wood**, who is the TIFCU Administrator, and **Mark K. McNulty**, who is the Assistant TIFCU Administrator. Please tell either of them if there is anything which we can do in order to make your visit more pleasurable.
- 4:00 p.m. - **Some Supper And Good Fellowship**  
5:50 p.m. Please join the TIFCU 2007 faculty, your friends, and your colleagues for a light buffet supper and good fellowship prior to the first TIFCU session, at 5:50 p.m.
- 5:50 p.m. - **Welcome And Introductions Of Evening Speaker**  
6:00 p.m. **By: Stewart T. Cobine**  
Managing Director And Assistant Treasurer  
Office Of The Treasurer  
Indiana University  
Bloomington, Indiana
- 6:00 p.m. - **Session 1 - Emerging Accounting, Auditing, And Sarbannes-Oxley Issues In Higher Education**  
7:00 p.m. **This Session Qualifies For Accounting/Auditing Credit For CPE Purposes.**  
**By: Kathleen T. McNeely**  
Assistant Vice President For Finance  
Indiana University  
Bloomington, Indiana
- 7:00 p.m. - **Session 2 - Open Source And The Quali Financial System Project**  
8:00 p.m. **This Session Qualifies For Accounting/Auditing Credit For CPE Purposes.**  
**By: Kathleen T. McNeely**  
Assistant Vice President For Finance  
Indiana University  
Bloomington, Indiana
- 8:00 p.m. - **A Little Night Fresh Air, A Sound Sleep, And Remember To Request A Wake-Up Call For Reveille**  
5:30 a.m.

## TIFCU 2007 PROGRAM - MONDAY, MAY 21, 2007

### Monday Morning, May 21, 2007 Schedule

- 6:00 a.m. - **Some Hot And/Or Cold Breakfast And Good Fellowship**  
7:30 a.m. Please join the TIFCU 2007 faculty, your friends, and your colleagues for a breakfast buffet of Indiana grits, Brown County biscuits, Monroe County apple butter, assorted hot breakfast entrees, fruit, cereal, assorted pastries, juice, coffee, and tea.
- 7:30 a.m. - **A Little Early Monday Morning Fresh Air**  
7:50 a.m.
- 7:50 a.m. - **Welcome And Introductions Of Sue E. Wood And Mark K. McNulty, TIFCU 2007 Administrators**  
8:00 a.m. **By: Lawrence A. Jegen, III**  
The Thomas F. Sheehan Professor  
Of Tax Law And Policy  
Indiana University School Of Law - Indianapolis  
Indianapolis, Indiana

8:00 a.m. - **Session 3 - Recent Tax Developments Which Affect You**

9:00 a.m. **By: Lawrence A. Jegen, III**  
The Thomas F. Sheehan Professor  
Of Tax Law And Policy  
Indiana University School Of Law - Indianapolis  
Indianapolis, Indiana

9:00 a.m. - **Session 4 - Another Year's Worth Of College And University UBIT**

10:00 a.m. **By: Edward J. Jennings**  
Tax Manager, Financial Operations,  
Certified Public Accountant And Attorney At Law  
University Of Michigan  
Ann Arbor, Michigan

10:00 a.m. - **A Little Monday Morning Fresh Air And Refreshments**

10:15 a.m.

10:15 a.m. - **Session 5 What Is New With Respect To Deferred Compensation And Retirement Plans For Faculty And Executive Managers?**

11:15 a.m. **By: Joseph R. Irvine**  
Tax Counsel And Associate Legal Counsel,  
Attorney At Law, And  
Certified Public Accountant  
The Ohio State University  
Columbus, Ohio

11:15 a.m. - **Session 6 - Recent Substantive And Procedural Developments Concerning IRS' Forms 990 And 990T**

12:00 p.m. **By: Mary E. Rauschenberg**  
Director And Certified Public Accountant  
Deloitte Tax LLP  
Chicago, Illinois

12:00 p.m. - **Some Lunch And Good Fellowship**

12:45 p.m. Please join the TIFCU 2007 faculty, your friends, and your colleagues for a buffet lunch in the ballroom. When you are ready, please return to the Auditorium for the next session.

12:45 p.m. - **A Little Early Monday Afternoon Fresh Air**

1:00 p.m.

**Monday Afternoon, May 21, 2007 Schedule**

1:00 p.m. - **Session 7 - An Economic Update For College And University Business Officers**

1:45 p.m. **By: Michael H. Strauss**  
Chief Operating Officer And Chief Economist  
Commonfund Asset Management Company, Inc.  
Wilton, Connecticut

1:45 p.m. - **Session 8 - Update Concerning Payroll Tax Compliance**

2:45 p.m. **By: Michael O'Neill**  
Manager, Payroll And Tax Services  
University Of California  
Oakland, California

2:45 p.m. - **A Little Monday Afternoon Fresh Air And Refreshments**

3:00 p.m.

3:00 p.m. - **Session 9 -Nonresident Alien Tax And Payment Compliance Update**

5:00 p.m. **By: Donna E. Kepley**  
President  
Arctic International LLC  
Washington, DC

5:00 p.m - **A Little Monday Late Afternoon Fresh Air**

5:30 p.m.

5:30 p.m. - **Some Supper, Good Fellowship, And The Best Indiana Music Of Hoagy Carmichael, Cole Porter, And Other Hoosiers**

7:00 p.m.

Please join the TIFCU 2007 faculty, your friends, and your colleagues for relaxing Hoosier music, a light supper buffet of assorted hors d'oeuvres, hot Virginia ham, hot Indiana turkey, chilled shrimp, spring rolls, assorted cheeses and vegetables, some wine, and good fellowship.

7:00 p.m. - **A Little Monday Night Fresh Air, Some Sightseeing In The Big City, A Sound Sleep, And Remember**

6:00 a.m.

**To Request A Wake-Up Call For 6:00 A.M.**

### **TIFCU 2007 PROGRAM - TUESDAY, MAY 22, 2007**

#### **Tuesday Morning, May 22, 2007 Schedule**

6:00 a.m. - **Some Hot And/Or Cold Breakfast And Good Fellowship**

7:45 a.m.

Please join the TIFCU 2007 faculty, your friends, and your colleagues for a breakfast buffet of Indiana grits, Brown County biscuits, Monroe County apple butter, assorted hot breakfast entrees, fruit, cereal, assorted pastries, juice, coffee, and tea.

7:45 a.m. - **A Little Early Tuesday Morning Fresh Air**

8:00 a.m.

8:00 a.m. - **Session 10 - Fringe Benefits And Employment Tax Developments**

9:00 a.m.

**By: Marianna G. Dyson**  
Member  
Miller & Chevalier  
Washington, DC

9:00 a.m. - **Session 11 - Current Major Issues Facing Colleges And Universities: A Practitioner's Perspective**

10:00 a.m.

**By: Bertrand M. Harding, Jr.**  
Attorney At Law  
Alexandria, Virginia

10:00 a.m. - **A Little Tuesday Morning Fresh Air And Refreshments**

10:15 a.m.

10:15 a.m. - **Session 12 - Impact Of The Pension Protection Act On Colleges And Universities**

11:15 a.m.

**By: James K. Hasson, Jr.**  
Partner And Attorney At Law  
Sutherland, Asbill & Brennan LLP  
Atlanta, Georgia

11:15 a.m. - **Session 13 - Preparing For And Defending An IRS Examination Of Your Tax-Exempt Financing**

12:15 p.m.

**By: W. Mark Scott**  
Partner And Attorney At Law  
Vinson & Elkins LLP  
Washington, DC

12:15 p.m. - **Some Lunch And Good Fellowship**  
1:00 p.m. Please join the TIFCU 2007 faculty, your friends, and your colleagues for a buffet lunch.  
Hotel Checkout: The hotel checkout time is 11:00 a.m., unless you make other arrangements with the hotel.  
When you are ready please return to the Auditorium for the next session.

1:00 p.m. - **A Little Early Tuesday Afternoon Fresh Air**  
1:15 p.m.

### **Tuesday Afternoon, May 22, 2007 Schedule**

1:15 p.m. - **Session 14 - An Insider's Guide For Those Who Wish To Be An Effective Tax Compliance Advocate**  
1:45 p.m. **By: Susan H. Brooks**  
Associate Vice Chancellor For Finance  
University Of North Carolina At Charlotte  
Charlotte, North Carolina

1:45 p.m. - **Session 15 - Update Of IRS Work Plan And The College And University UBIT Project**  
3:00 p.m. **By: Travis L. Patton**  
Tax Director And Certified Public Accountant  
PricewaterhouseCoopers LLP  
Washington, DC

3:00 p.m. **TIFCU 2007 Is Over**  
We hope that you will join our faculty, your friends, and your colleagues for TIFCU 2008 during May 18, 19, and 20, 2008. And, with our warmest Indiana goodbyes, we add: You all come back for more Indiana grits, Brown County biscuits, Monroe County apple butter, Hoosier music, professional education, and good fellowship.

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## HELPFUL INFORMATION

### OBJECTIVES OF TIFCU

The objectives of TIFCU are to provide intermediate and advanced level, timely, accurate, and comprehensive tax training with respect to college and university tax compliance and planning, for college and university business officers, accountants, lawyers, and financial advisors. There are no prerequisites for this learning experience.

### LODGING AND WHAT TO WEAR

To ensure lodging at the University Place Hotel, please make your room reservations promptly either by telephone - 800-627-2700 or 317-269-9000 or by fax - 317-231-5168 stating that you are attending TIFCU 2007 and that the group code is: 070514THAN. Hotel reservations can also be made online at <https://reserve.universityplace.iupui.edu/webbook/>, when you are prompted for the group number you should type in the above group code. If necessary, the hotel will make referrals to excellent nearby hotels. The University Place Conference Center And Hotel are located at 850 West Michigan Street, Indianapolis, Indiana 46204-5198. The hotel rooms cost \$148.35 (this cost includes all taxes) per night for single occupancy and \$165.60 (this cost includes all taxes) per night for double occupancy. Please dress casually and comfortably.

### REGISTRATION FEE AND QUID PRO QUO

The registration fees are as follows: \$625 — per individual; \$575 — for each additional attendee from the same institution or affiliated organization. Each registrant is entitled to attend all speaking sessions and have a light supper on Sunday and Monday, a breakfast and a lunch on Monday and Tuesday, eight fresh air breaks, and a program workbook of faculty outlines and other materials. Refreshments are available, for no charge, throughout the institute proceedings. You may park an automobile, for no charge, in the underground parking garage of the hotel. If you cancel your registration on or before May 14, 2007, then you will receive a full refund of your paid fee. If you cancel your registration after May 14, 2007, then you will receive a refund of your paid fee minus a \$50 cancellation fee. For more information regarding administrative policies such as a refund, please contact our offices at 812-855-0709. If you are unable to attend any TIFCU 2007 speaking session, then you may send an alternate attendee or receive a refund as previously stated. All registrations made after May 7, 2007 must be made by fax. However, no registration is final until payment is received by a TIFCU 2007 administrator.

### REGISTRATION BY MAIL

Please include a check payable to **Indiana University** and mail your registration form and the check to:

TIFCU  
Post Office Box 2327  
Bloomington, IN 47402-2327

### REGISTRATION BY FAX

TIFCU's fax number is: 812-855-9779

### REGISTRATION BY WEBSITE

TIFCU's website is [www.indiana.edu/~tifcu](http://www.indiana.edu/~tifcu)

### CONFIRMATION OF REGISTRATION

All registrations will be confirmed by mail or email. If you have not received your confirmation by May 8, 2007, please contact a TIFCU 2007 administrator by telephone 812-855-0709 or by fax 812-855-9779 or email [TIFCU@indiana.edu](mailto:TIFCU@indiana.edu)

### CONTINUING EDUCATION CREDITS

On request by an attendee, a TIFCU 2007 administrator will apply for credit from any accreditation board or commission and pay any applicable provider fee. Charges imposed by such boards or commissions on the attendee must be paid by the attendee. If you attend each TIFCU 2007 session, then you should receive 18 hours of CPE/CLE credit based on a 50-minute/hour standard and 15 hours of CPE/CLE credit based on a 60-minute/hour standard. Accountants — All past TIFCU institutes have been granted approval as a qualified provider of CPE credit in all states in which a request for approval was filed. TIFCU 2007 is registered with the National Association of State Boards of Accountancy as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority with respect to the acceptance of individual courses for approved credit. For more information regarding administrative policies such as complaint resolution, please contact our offices at 812-855-0709. Lawyers — TIFCU 2007 is recognized as an approved sponsor of CLE credit with the Indiana Commission for Continuing Legal Education and with all other states to which CLE credits have been submitted.

### ELECTRONIC RECORDINGS AND MARKETING

Each attendee of TIFCU sessions agrees that Indiana University may electronically copy, record, duplicate, print, and distribute all or any of the TIFCU sessions. No person other than Indiana University may electronically copy, record, duplicate, print, or distribute all or any of the TIFCU speeches or materials for any purpose without the prior express written consent of Indiana University. Each attendee of any TIFCU session agrees to not market services or products during any TIFCU conference. TIFCU does not receive any remuneration or other underwriting from any commercial enterprise. TIFCU is totally self-supported.

### ABOUT INDIANAPOLIS

In or nearby downtown Indianapolis are many attractive facilities (many of which are open on Sundays), including the White River State Park and Canal Walk, the Circle Center Shopping Mall, the Indianapolis Zoo, the Indianapolis Museum of Art, the Eiteljorg Museum of American Indian And Western Art, the Indiana State Museum, the Indianapolis Children's Museum (which is the world's largest children's museum), the Hall of Fame Museum (Indianapolis 500), the Benjamin Harrison Presidential Home, the James Whitcomb Riley Home, and various marketplaces, such as the Indianapolis City Market. A short walk from the conference center are a variety of sports facilities such as the Indiana University Natatorium, the Indiana University Track And Field Stadium, the Indiana World Skating Academy, the RCA Dome (home of the NFL Indianapolis Colts, Super Bowl XLI World Champions), the Conseco Field House (home of the NBA Indiana Pacers and the WNBA Indiana Fever), Victory Field (home of the AAA Indianapolis Indians), Pepsi Coliseum (home of Indiana Ice), and the Indianapolis Motor Speedway (home of the Indianapolis 500 car race and of the Brickyard 400 NASCAR race). Also, in other facilities are: the Indianapolis Symphony Orchestra, the Indiana Repertory Theatre, the Indianapolis Opera Company, the Indianapolis Ballet Theater, the Dance Kaleidoscope, and the NCAA headquarters and NCAA Hall of Champions.





# TIFCU 2007 REGISTRATION FORM

14<sup>th</sup> Annual Tax Institute For Colleges And Universities  
May 20, 21, and 22, 2007 - Presented By Indiana University

Prior to filling in this registration form, please make several copies of it for your interested colleagues.

PLEASE FILL IN THIS REGISTRATION FORM AND SEND IT TO:

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INCLUDE A CHECK MADE PAYBLE TO:

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FOR THE FOLLOWING AMOUNT:

\$625 per individual and \$575 for each additional attendee from the same institution or affiliated organization.

If you cancel your registration on or before May 14, 2007, then you will receive a full refund of your paid fee. If you cancel your registration after May 14, 2007, then you will receive a refund of your paid fee minus a \$50 cancellation fee. For more information regarding administrative policies such as a refund, please contact our offices at 812-855-0709. If you are unable to attend any TIFCU 2007 speaking session, then you may send an alternate attendee or receive a refund as previously stated. All registrations made after May 7, 2007 must be made by faxing this registration form to 812-855-9779. However, no registration is final until payment is received by a TIFCU 2007 administrator.

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