

TSCPA Knoxville Chapter 2009-2010 Education Schedule

	Mini-Seminars	Dinner
Jan. 13, 2009	Smitty Governmental Update/Reading Governmental Reports ----- Peter J. Towle 990 Changes & Updates	R. Michael Cain, TSCPA President & Brad Floyd, TSCPA Executive Director
Feb. 10, 2009	Duncan B. Will, CPA/ABV, CFE Loss Prevention Specialist CAMICO Mutual Insurance Company A & A Topic to be Announced ----- Dr. Richard Townsend A & A Update	Dr. John Nolt Environmental Ethics
March 10, 2009	Robert L. Webb Owner - Robert L. Webb & Associates Lean Management Solutions, LLC Transition Management ----- Dr. O.H. Oliveira, Ph.D., ABMP How to Protect the Interests of Those with Dementia & Brenda Southerland, LCSW, CCM Elder Care Planning - Options & Resources	Don Dare 6 on Your Side Anchor/Reporter WATE 6 Topic to be Announced
May 12, 2009	Ronnie Roberts Tax Audit Supervisor TN Dept. of Revenue Tennessee Sales & Use Tax Update Tennessee Franchises & Excise Tax Update ----- Pam Fansler President & East Tennessee Market Manager First Tennessee Bank Banking Update & Taylor Vaughan SVP of Treasury Management Services First Tennessee Bank Bank Regulation and Technology Changes	Don Robinson Chief Investment Officer Lockwood Advisors/Bank of New York Mellon Global Economic and Market Outlook: Revisiting Risk & Return in a Turbulent Market

<p>June 09, 2009</p>	<p>Stacy Ellison Roettger Vice President & Manager of Personal Trust The Trust Company of Knoxville Planning with Grantor Trusts ----- Doug Arnold & Pace Porter Pershing & Yoakley, P.C. Investment Accounting Update & The FASB Accounting Standards Codification</p>	<p>Hallerin Hilton Hill Striking the Right Cord Pulling the 6 Strings of Success for Maximum Personal and Professional Effectiveness</p>
<p>July 14, 2009</p>	<p>Robert Charron Insurance Specialist The Hartford Wealth Transfer Planning with Family Limited Partnerships & Planning for High Net Worth Clients ----- Sam Coulter & Adam Allen Coulter & Justus, P.C. ICFR For Issuers and Non-Issuers</p>	<p>Ginny Weatherstone, CEO Volunteer Ministry Center The Journey Home: Ending Chronic Homelessness</p>
<p>Aug. 11, 2009</p>	<p>Mark A. Paganelli Executive Director of Audit & Consulting Services University of Tennessee System Keeping Your Organization Out of the Headlines: Five Elements of Proper Internal Control Structure ----- Timothy G. Philips, CPA & Marc A. Zuckerman, CPA Principals, Coulter & Justus, P.C. U.S. International Taxation 101</p>	<p>TN State Senator Doug Overbey A Review of the 2009 Legislative Session: From Ammunition & Guns to Walleye & Crappie</p>
<p>Sept. 01, 2009</p>	<p>Jim Myers, CPA, Principal Rodefer Moss Knoxville Ethics Standards for Tennessee CPA's General & TN State Specific Ethics</p>	<p>Vicki Humphreys & Krista Maggard Shoe Box Ministry Samaritan's Purse International Relief Operation Christmas Child: The Power of a Simple Gift</p>

<p>Oct. 13, 2009</p>	<p>Dr. Sharon Teets Interim Dean of the School of Education Carson Newman College Intergenerational Leadership & Management ----- Edgar Gee, CPA, DABFA, MBA Individual Practitioner How to Handle IRS Audits & Appeals</p>	<p>Dee Haslam CEO, Rivr Media Interactive Topic to be Announced</p>
<p>Nov. 10, 2009</p>	<p>Pamela S. Mantone, CPA, CFF, CFE, FCPA Audit Manager Joseph Decosimo and Company, PLLC Analyzing Financial Information - Tools to Find Those Questionable Transactions ----- Ron Perry, Partner & Brooke Thurman LBMC Employment Partners, LLC The PEO & Other Employee Benefit Options</p>	<p>Congressman John J. Duncan Tentatively Scheduled For Topic to be Announced</p>
<p>Dec. 08, 2009</p>	<p>Woolf, McClane, Bright, Allen & Carpenter, PLLC 4-hour Tax Program Topics to be Announced</p>	<p>No Dinner Speaker Per Ben Alexander TSCPA Knoxville Chapter President Christmas Celebration</p>
<p>Jan. 12, 2010</p>	<p>Hugh Black of Grubb & Ellis & Richard D. Albright General Securities Principal Equity Financial Group IRC 1031 Exchanges, Stretch IRA's, Fixed Index Annuities, & Other Financial Planning Tools ----- Smitty Associate Professor Middle Tennessee State University Department of Accounting Governmental Update</p>	<p>Joseph Carcello, Ph.D., CPA, CIA, CMA Professor The University of Tennessee Dept. of Accounting & Information Mgmt Topic to be Announced</p>

<p>Feb. 09, 2010</p>	<p>Dave Sagraves Claris Networks The Future and Trend of IT ----- Dr. Richard Townsend University of Tennessee Department of Accounting A & A Update</p>	<p>Roger Jones President Junior Achievement of East Tennessee Financial Literacy</p>
<p>Mar. 09, 2010</p>	<p>Ron Parisi, CPA, J.D. National Program Director CAMICO Mutual Insurance Company Current Issues in Risk Management ----- Robert L. Webb Owner - Robert L. Webb & Associates Lean Management Solutions, LLC Lean Accounting</p>	<p>Rick Shepard, President United Community Bank The Revised SBA Loan Program</p>
<p>Apr. 13, 2010</p>	<p>No Meeting</p>	<p>No Meeting</p>