



# Rhode Island Department of Revenue

## Division of Taxation

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### Seminar for Tax Preparers: Agenda

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First session: November 18, 2015, from 9:00 a.m. to 12 noon, CCRI in Warwick  
Second session: December 10, 2015, from 9:00 a.m. to 12 noon, CCRI in Newport

- 9:00 a.m. to 9:05 a.m.

#### **Greetings**

David Sullivan / Tax Administrator

- 9:05 a.m. to 9:10 a.m.

#### **Housekeeping / Introduction**

Neil Downing, EA, CFP® / Chief Revenue Agent

- 9:10 a.m. to 9:25 a.m.

#### **E-File Update**

Leo Lebeuf / Chief Revenue Agent, Personal Income Tax

- 9:25 a.m. to 10:15 a.m.

#### **Personal Income Tax Update**

Leo Lebeuf / Chief Revenue Agent, Personal Income Tax  
Matthew Lawlor or Scott Lewis / Principal Revenue Agents, Personal Income Tax

- *What's new for filing season*
- *What's new for tax year 2016*
- *Property-tax relief credit (Form RI-1040H) review*
- *Other items and reminders*

- 10:15 a.m. to 10:30 a.m.

### **Regulatory Update**

Neena Savage, Esq. / Associate Director of Revenue Services

- *New tax credits focused on job creation and business growth*
  - *Corporate tax regulations*
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10:30 a.m. to 10:40 a.m.

+ **Break** +

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- 10:40 a.m. to 11:15 a.m.

### **Corporate Income Tax / Pass-Through Entities**

Marlen Bautista / Chief Revenue Agent, Corporate Tax

Richard Coia / Principal Revenue Agent, Corporate Tax

- *What's new for filing season*
- *What's new for tax year 2016*
- *Other items and reminders*

- 11:15 a.m. to 11:45 a.m.

### **Sales and Use Tax / Excise Tax**

Donald Englert / Chief Revenue Agent, Excise Tax

Susanna Coburn or Theriza Salib-Iafrate / Principal Revenue Agents, Excise Tax

- *Sales and hotel tax on short-term residential rentals*
- *Annual reconciliation*
- *Other items and reminders*

- 11:45 a.m. to 12:00 noon

### **Collections / Self-Audits / Closing Remarks**

Michael F. Canole, CPA / Chief of Examinations

- *What's new in Collections*
- *Self-audits*
- *Reminder on Certificate of Completion*
- *Closing remarks*

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NOTE: Agenda times are approximate. Agenda topics and speakers are subject to change. To be eligible for Certificate of Completion, you must stay for entire session today and complete and hand in evaluation form found on last page. Certificates will be distributed at end of today's program near main entrance to meeting room. Today's agenda and supporting documents will be posted online at [www.tax.ri.gov/onlineservices](http://www.tax.ri.gov/onlineservices). Thank you for attending.



## Rhode Island Division of Taxation Seminar Evaluation Form

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*Thank you for participating in our "Tax Preparers' Seminar." By completing the evaluation form below, you will help us improve our future programs. Please hand your completed evaluation form to the greeter at the door following the seminar to obtain a "Certificate of Completion." Thank you.*

<b>Evaluation</b>	
Name of Seminar Provider:	Rhode Island Division of Taxation
Seminar Name:	"Seminar for Tax Preparers"
Date Seminar was Completed:	Please circle one date: Nov. 18, 2015 <b>or</b> Dec. 10, 2015
Your Name (optional):	
<b>Instructions:</b> Please grade all of the following evaluation points for this seminar. For each one, please assign a number grade, using a scale of 1 to 5, with 5 being the highest.	
1. Were stated learning objectives met?	
2. Were program materials accurate, relevant and did they contribute to the achievement of the learning objectives?	
3. Was the time allotted to learning adequate?	
4. Were the facilities / equipment appropriate?	
5. Were the handout materials <small>[print and/or online]</small> satisfactory?	
6. Were the audio and video materials effective?	
7. Were individual presenters knowledgeable and effective?	

Additional Comments (optional):