

# TaxRAPP 2009 Agenda

**CHAIR: ROCHELLE PATRICOFF, FIRST DEPUTY COMMISSIONER, NYC FINANCE**

- 8:00 - 8:30**                    **REGISTRATION AND CONTINENTAL BREAKFAST**
- 8:30 - 8:55**                    **WELCOME AND INTRODUCTIONS**  
**Commissioner David M. Frankel, NYC Finance**  
**First Deputy Commissioner Rochelle Patricof, NYC Finance**  
  
**Lori Matulewicz – President, NY Chapter, TEI**  
**& VP, Company Tax Advisory Group, Prudential Financial Inc.**  
**Glenn Newman – President, NYC Tax Commission;**  
**President and Commissioner – NYC Tax Appeals Tribunal**
- 8:55 - 9:45**                    **NYC FINANCE’S PRIORITIES FOR THE COMING YEAR**  
**Commissioner David M. Frankel**
- 9:45 - 10:35**                  **THE STATE OF MULTI-STATE TAXATION**  
**Presenters:**  
**Paul H. Frankel – Partner, Morrison & Foerster LLP**  
**Richard D. Pomp – Alva P. Loisel Professor of Law, UConn Law School**
- 10:35 - 10:45**                  **BREAK**
- 10:45 - 11:35**                  **IMPROVING THE AUDIT PROCESS**  
**Moderator:**  
**Karen Schlain – Assistant Commissioner, TAPE, NYC Finance**  
**Panelists:**  
**Richard Genetelli – Managing Director, Genetelli Consulting Group**  
**Peter Rabinowitz – Chief of Audit Operations, TAPE, NYC Finance**  
**Jonathan Robin – Director, State and Local Tax Practice, PricewaterhouseCoopers**
- 11:35 - 12:25**                  **NEW YORK STATE-NEW YORK CITY CONFORMITY:**  
**Where Do We Go From Here?**  
**Moderator:**  
**Deputy Commissioner Michael Hyman – TAPE, NYC Finance**  
**Panelists:**  
**Peter Faber – Partner, McDermott, Will & Emery LLP**  
**Robert D. Plattner – Deputy Commissioner, Tax Policy, NYS Taxation & Finance**
- 12:25 - 2:00**                    **LUNCH AND KEYNOTE ADDRESS**  
  
**THE ACCOUNTANTS LET US DOWN**  
**FLOYD NORRIS – Chief Financial Correspondent, *New York Times***
- 2:00 - 2:50**                    **DISCRETIONARY AUTHORITY**  
**Moderator:**  
**Dara Jaffee – Assistant Commissioner, Legal Affairs Division, NYC Finance**  
**Panelists:**  
**Mark Klein – Partner, State and Local Taxes, Hodgson Russ, LLP**  
**Michael Newmark – Director, Tax Advocacy & Resolution, Legal Affairs Division, NYC Finance**
- 2:50 - 3:40**                    **STATE & LOCAL TAX POLICIES IN AN ECONOMIC DOWNTURN**  
**Moderator:**  
**Ronnie Lowenstein – Director, NYC Independent Budget Office**  
**Panelists:**  
**Greg David – Editor, *Crain’s New York Business***  
**Frank J. Mauro – Executive Director, Fiscal Policy Institute**
- 3:40 - 3:50**                    **BREAK**
- 3:50 - 4:40**                    **ETHICAL ADJUDICATION: NYC’S RULES OF CONDUCT**  
**FOR ADMINISTRATIVE LAW JUDGES AND HEARING OFFICERS**  
**Panelists:**  
**David B. Goldin – Administrative Justice Coordinator, Office of the Mayor**  
**Glenn Newman – President, NYC Tax Commission;**  
**President and Commissioner – NYC Tax Appeals Tribunal**
- 4:40 - 5:00**                    **CLOSING REMARKS**
- 5:00 - 6:30**                    **WINE AND CHEESE RECEPTION**



NYC Finance in partnership with  
NY Chapter of Tax Executives Institute

*Presents*

## TaxRAPP 2009

### *The 16th Annual* **Tax Representatives and Practitioners Program**

Join us for a day of presentations and panel discussions featuring tax policy experts, distinguished business and property tax practitioners, and government officials. We are pleased to have as keynote speaker Floyd Norris, Chief Financial Correspondent, *New York Times*. At the end of the day, be our guest at a wine and cheese reception, where you can network with the speakers and other participants.

Monday, November 9th, 2009  
8:00 am - 6:30 pm  
The New York Athletic Club, 11th Floor  
180 Central Park South  
at 59th Street off 7th Avenue  
New York City

Obtain CLE/CPE credits, and learn what's new at Finance.  
Register today online at: [nyc.gov/taxrapp](http://nyc.gov/taxrapp)

#### **REGISTRATION**

The conference fee of \$280 includes seminar, continental breakfast, lunch (chicken, salmon, Kosher, or vegetarian meal available upon request), a wine and cheese reception at the end of the day, and CLE/CPE credits.

Register today online at: [nyc.gov/taxrapp](http://nyc.gov/taxrapp), or mail your application, along with the conference fee to: NYC Department of Finance, 59 Maiden Lane, 22nd Floor, New York, NY 10038, Attn: Lee Fiorino.

Phone: (212) 232-1843 • Fax: (212) 232-1890 • e-mail: [FiorinoL@finance.nyc.gov](mailto:FiorinoL@finance.nyc.gov)

Make your check or money order payable to NYC Department of Finance. Payments may also be charged to your credit card (American Express, Discover, MasterCard, Visa).

#### **CONTINUING LEGAL EDUCATION (CLE) AND CONTINUING PROFESSIONAL EDUCATION CREDITS (CPE)**

The New York State Continuing Education Board has certified the Department of Finance as an accredited provider of continuing legal education. Under New York's MCLE rules, this program is approved for 1 credit hour in ethics and 7.5 credit hours in skills, practice management and/or areas of professional practice, for a total of 8.5 credits for attorneys. Because this is not a basic-level course, it cannot be used by recently admitted attorneys for New York MCLE credit. Pursuant to New York State Continuing Education Board rules, attorneys must attend for the entire day to earn CLE credits. In addition, the New York Chapter of Tax Executives Institute (TEI), co-sponsor of TaxRAPP, is an accredited provider of Continuing Professional Education (CPE) recognized by the IRS Director of Practice pursuant to Treasury Department Circular 230, and by the NYS Department of Education for CPE in Taxation. EA's, CPA's, PA's, and CFP's may earn up to 9 CPE credits for participating in the program.

#### **ASK FINANCE**

If you have questions that you would like addressed at TaxRAPP, please submit them to us when you register. During the program, as time allows, we will respond to the most frequently asked questions. If the subject is not of general interest, we will contact you individually with an answer.

#### **HARDSHIP POLICY**

Anyone wishing to attend TaxRAPP may apply for a discount based on financial hardship. The application must be in writing, present a genuine financial hardship, and be received by the Department of Finance no later than October 30. For more details, please call Lee Fiorino at (212) 232-1843 or contact via e-mail at [FiorinoL@finance.nyc.gov](mailto:FiorinoL@finance.nyc.gov)

**NYC**<sup>TM</sup>  
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David M. Frankel  
Commissioner



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