

FEDERATION OF TAX ADMINISTRATORS

73RD ANNUAL MEETING ★ SAN ANTONIO, TEXAS ★ JUNE 12-15, 2005



MEETING ANNOUNCEMENT

Federation of Tax Administrators President Mary Jane Egr Edson, Texas Comptroller Carole Keeton Strayhorn, the staff of the Texas Comptroller of Public Accounts, and the FTA Board of Trustees cordially invite you to attend the 73rd Annual Meeting of the Federation of Tax Administrators at the Crowne Plaza San Antonio Riverwalk Hotel, June 12-15, 2005, in San Antonio, Texas.

Conference Schedule

The meeting begins with registration on Sunday, June 12, and concludes at noon on Wednesday, June 15. General sessions will be held Monday, Tuesday and Wednesday mornings. In-depth sessions organized around legal/policy, technology, tax compliance, and management developments are scheduled for Monday and Tuesday afternoons. The President's Awards luncheon will be held Monday, and the FTA Annual Business Meeting will take place on Wednesday morning. The opening reception will be held Sunday evening and will feature the many "Tastes of Texas." Tuesday evening will feature a banquet with entertainment at historic Southwest School of Art and Craft, just a short stroll down the Riverwalk from the Crowne Plaza.

General Sessions

Monday. The opening general session will be devoted to current issues and initiatives in federal and state tax compliance. IRS Commissioner Mark W. Everson has been invited to address the opening general session. Carole Keeton Strayhorn, the first female Comptroller of Public Accounts, will discuss Texas tax policy and lessons learned from six years of tax administration in the Lone Star State. Other discussions will focus on state compliance initiatives as well as issues from the taxpayer's point of view.

Tuesday. Tuesday will be "Federal Day" with the general session devoted to an examination of current issues in federal tax and budget policy and the impact on the states, the outlook for the U.S. economy, and the implications of federal tax reform for state tax systems.

Wednesday. The concluding session will focus on state tax and budget issues. Expected topics include current fiscal conditions, the streamlined sales tax project, state tax reform efforts, and emerging technology applications of interest to states.

President's Awards Luncheon

The President's Awards luncheon will be held Monday. Awards will be presented for outstanding initiatives by state tax agencies in Technology and Research. The annual FTA Leadership and Service Award winner will also be honored. The luncheon will also feature presentation of the Wade Anderson Medal to an individual who best exemplifies the commitment to interstate cooperation in state tax administration that Wade demonstrated during his tenure with the Texas Comptroller.

Commissioners' Breakfast

There will be a breakfast for the senior tax administrator in each state on Monday and Tuesday mornings at 7:00 a.m. There will be an executive briefing on state and federal issues important to the states as well as an update on FTA activities.

Breakout Sessions

The conference will also feature concurrent sessions on legal and tax policy developments, management and compliance initiatives and leading-edge technology applications.

Legal/Policy. Topics under consideration for the two sessions include noteworthy court decisions; business tax issues such as abusive tax avoidance transactions, expense disallowance statutes and nexus; tax incentives and the Cuno decision; telecommunications taxation; issues in conforming to federal legislation; and a panel discussion on reducing tensions between taxpayers and tax agencies.

Management/Compliance. Expected topics in the Management breakout include preparing for a building-wide crisis, choosing the right e-file options for your state, statewide online filing for local taxes, and using Business Intelligence to improve tax agency management. The Compliance breakout will focus on federal and state initiatives, successful data exchanges in tackling abusive transactions, Voluntary Compliance Initiatives, battling conservation easements, and pursuing promoters of abusive transactions.

Technology. Planned for the Monday program are updates on state e-filing matters including the process for new Fed/State E-File programs, a Fed/State joint payment pilot, and implementing Streamlined Sales Tax applications. The second afternoon is expected to address integrated tax system efforts, compliance applications, and the FTA 2005 Technology Award winner.

Continuing Education Credits

Participants seeking continuing education credits will be asked to complete attendance forms and evaluations on site.

Local Arrangements

San Antonio is a venerable city that wears its layers of history and culture with flair. And when the music kicks up and San Antonio swings, you know you've landed someplace special.

With so much to see and learn and hear – and taste – San Antonio will tempt you from the river to the missions. You're about to find out why noted Texas historian Frank Tolbert says, "Every Texan has two homes, his own and San Antonio." Whether you're touring the historic arts village LaVillita, cruising the Paseo Del Rio, shopping in the Market Square/El Mercado, or reveling in the history of the Alamo, you'll be constantly reminded of San Antonio's mixed heritage, a rich blend of Indian, French, Spanish, German and even cowboy cultures.

Those who like their culture to include a lot of sunshine (more than 300 days annually in San Antonio), balmy air (average temperature is 68.8 degrees) and green grass will want to start with Sunday's golf outing. The four-person scramble will be at the Quarry Club golf course where the back 9 actually plays down in the old quarry. And those who define culture as "something fun to eat" won't want to miss the opening reception at the hotel, which will feature the many Tastes of Texas.

On Monday, guests and spouses will enjoy a special tour that will take them to the Alamo, the IMAX theatre, Market Square/El Mercado, and the Missions San José and Concepción. But, there's more! The tour also includes the Japanese Sunken Gardens and a relaxing cruise down the Paseo Del Rio.

On Tuesday, guests will visit the Tower of the Americas, the Institute of Texan Cultures, the historic Guenther House, the Buckhorn Museum and LaVillita historic arts village.

All attendees will be treated to a closing banquet at the historic Southwest School of Art & Craft, a gentle stroll down the cool Riverwalk. This former girls' school – and a former Ursuline convent – is classic southern gentility at its best, featuring fountains, a gazebo, and a courtyard canopied by grand pecan trees.

Those thick white walls and broad-plank floors also make the perfect backdrop for the fiddle music of Western Swing legend Johnny Gimble, who will entertain with a special swing orchestra that includes three generations of Gimble musicians. Gimble is one of the originators of Western Swing, having played with Bob Wills and the Texas Playboys. In addition to a lifetime as a touring musician, he has been one of the country's premier studio musicians for more than 50 years. You can find the special Johnny Gimble sound on recordings by artists as diverse as Willie Nelson, Paul McCartney, Loretta Lynn, Joan Baez and Jimmy Buffet.

Links to these places and information on the Annual Meeting can be found on the conference Website at www.taxadmin.org.

Conference Registration

Registration fees for the annual meeting this year are:

\$375 for government attendees
\$475 for non-government attendees
\$175 for guests

To register, complete the enclosed Conference Registration Form with payment made payable to **FTA 2005 Annual Conference**. Send registration and payment to:

FTA 2005 Annual Conference
P.O. Box 12036
Austin, TX 78711-2036

The registration deadline is May 23; after that date, please add a \$50 late fee. For questions on registration, please e-mail fta2005@cpa.state.tx.us or call (512) 463-3737. To register for the golf outing or to register a guest, be sure to check the appropriate information on the registration form and include payment when sending in the conference registration form.

You may also register and/or pay online at www.taxadmin.org.

Hotel Reservations

The conference will be held at the [Crowne Plaza San Antonio Riverwalk Hotel](http://www.crowneplaza.com/sariverwalk), located at 111 Pecan Street East, San Antonio, Texas 78205. The rate at the Crowne Plaza is \$119 plus tax per night (single or double). To make your reservations, call 888-623-2800 and ask for the Federation of Tax Administrators room block. **The deadline for making reservations is May 10, 2005.** Rooms may also be booked online at <http://www.crowneplaza.com/sariverwalk>; use Group Booking Code "FTA" in making the reservation.

2005 FTA Annual Meeting Schedule

Sunday, June 12

- 1:00 p.m. - 7:00 p.m. Registration
- 7:30 p.m. - 9:30 p.m. Opening Reception
Taste of Texas

Monday, June 13

- 7:30 a.m. - 5:00 p.m. Registration
- 8:30 a.m. - Noon General Session
Focus on current state and federal compliance initiatives. IRS Commissioner Mark W. Everson (invited) and Texas Comptroller Carole Keeton Strayhorn will address the conference.
- Noon - 1:45 p.m. FTA President's Awards Luncheon
- 1:45 p.m. - 5:00 p.m. *Concurrent Breakout Sessions*
Legal/Policy
Technology
Management/Compliance

Tuesday, June 14

- 8:30 a.m. - Noon General Session
Focus on tax and budget issues and their implications for states.
- Noon - 1:30 p.m. Lunch on your own
- 1:30 p.m. - 5:00 p.m. *Concurrent Breakout Sessions*
Legal/Policy
Technology
Management/Compliance
- 7:00 p.m. Reception and Closing Banquet
Southwest School of Art and Craft
Entertainment and Dancing with Johnny Gimble
The School is a short walk from the hotel.

Wednesday, June 15

- 8:30 a.m. - 9:00 a.m. Annual Business Meeting
- 9:00 a.m. - Noon General Session
Focus on current and emerging state fiscal and tax policy issues.

A more detailed conference program will be posted by mid-April at www.taxadmin.org.