

# 台美會計師協會 TAIWANESE AMERICAN CPA ASSOCIATION

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President : Rachel Siu 劉廣然  
Secretary : Chris Tang 唐慧珍  
Treasurer : Johnny Huang 黃智良

VPs East Mir VPs East Ming Lee 李銘正  
MW Judith I MW Judith Lin 林麗華  
West May H West May Ho 何美惠

## 2009 Annual Meeting Agenda

**December 3 – 5, 2009**  
**Carnival Sensation, Promenade Deck (#9)**  
**Total 9 hours CPE Provided**

**6-Dec-09**  
**SpringHill Suites Orlando Airport of Marriott**  
**5828 Hazeltine National Drive**  
**Orlando, Florida 32822 USA**  
**Total 7 hours CPE Provided**

Date	Time	Topic	Instructor(s)	Total hours Provided	Attendent hours	Instructor hours	Total Hours
Thursday, 12/3/2009	04:30-6:00 PM	Introduction of International Taxation: The tax systems in US, Taiwan, China, and Hong Kong	May Ho	1.5	1.5	1.5	3
Thursday, 12/3/2009	06:00-7:00 PM	1040NR & 1120F (2): Taxation on income not effectively connected with a US trade or business: insurance, annuities, stock, bonds, bank deposit, etc. – Julia Lin	Julia Lin	1	1	0	1
Thursday, 12/3/2009	07:00-8:00 PM	Form 8854 Expatriate Tax on Giving up Citizenship & Green Cards –	Grace Hsieh	1	1	0	1
Friday, 12/4/2009	08:00-9:30 AM	Taiwan tax Update – New AMT tax in Taiwan and how to report Taiwan's income & estate in US tax returns	May Ho	1.5	1.5	1.5	3
Saturday, 12/5/2009	08:00-9:30 AM	Information Returns on Overseas Investments: FBAR, 5471, 5472	Davis Chang & May Ho	1.5	1.5	1	2.5
Saturday, 12/5/2009	4:30 -5:30 PM	Investment & Tax Strategies for Foreign Investors	May Ho	1	1	1	2
Saturday, 12/5/2009	5:30 -7:00 PM	Practice management – client retention; clients/employees relationship; billing - Panel discussion lead	Ming Lee	1.5	1.5	0	1.5
Sunday, 12/6/2009	10:00-11:00 AM	Overview - international taxation	Rachel Siu	1	1	0	1
Sunday, 12/6/2009	11:00-12:00 PM	International financial reporting standard (IFRS)	Jenny Wei	1	1	0	1
Sunday, 12/6/2009	12:30-01:30 PM	Federal Tax update	Jeff Lee	1	1	0	1
Sunday, 12/6/2009	01:30 – 03:30 PM	Estate taxation for NRA and RA & Asset protection	Kenneth Wheeler	2	2	0	2
Sunday, 12/6/2009	01:30 –02:30 PM	Accounting of Foreign transactions	Liyuan Woerner	1	1	0	1
Sunday, 12/6/2009	03:30 – 05:30 PM	Practice management panel discussion, Software evaluation; office efficiency enhancement; file management (paperless operation) etc.	Liren Wei	2	2	0	2
<b>Total Hours</b>				<b>17</b>	<b>17</b>	<b>5</b>	<b>22</b>

**Certified by:**

**Attendent:**

\_\_\_\_\_  
Rachel Siu, President, Date

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Sign & Date