

A Carnival of Information



27th
annual
ACCOUNTING SHOW

September 19-21, 2012

Broward County Convention Center / Ft. Lauderdale



**27th Annual Accounting Show
September 20, 2012
Ft. Lauderdale**

8:15am-9:15am

General Session Track.....1
Dean A. Zerbe
Alliant Group

2011 - 2012 Accounting Shows Committee		
Gary Fracassi - Chair		
Paulette Holder - Vice Chair		
Randee Abramson	Lucinda Gallagher	Christine Moreno
Jaime Angarita	Wendy Johnson	Mario Nowogrodzki
Alan Campbell	Thomas Longman	Pat Patterson
Bethany Carr	James Luffman	Robert Rankin
Lynn Clements	William Maloney	Richard Shapiro
Richard Dotson	Roger Michels	Poornima Srinivasan

Keynote Address: U.S. Tax Issues

Dean A. Zerbe

Dean Zerbe, J.D., LL.M.
National Managing Director - Washington, D.C. Office
alliantgroup

Dean Zerbe is National Managing Director for alliantgroup and is based out of alliantgroup's Washington D.C. office. In this role, Dean is responsible for, among other things, monitoring tax-related legislative activity in Washington to help keep our clients and staff informed and help direct alliantgroup's service offerings to ensure we are meeting client needs.

Prior to joining alliantgroup in February, 2008, Dean was Senior Counsel and Tax Counsel to the U.S. Senate Committee on Finance, where he worked closely with the Chairman (and currently Ranking Member) of the Finance Committee, Senator Charles Grassley (R-IA) on tax legislation. During his time on the Finance Committee, Dean was intimately involved with almost every major piece of tax legislation that was signed into law – including the 2001 and 2003 tax reconciliation bills (representing two of the largest tax cuts in the nation's history); the JOBS bill in 2004 (corporate tax reform); and, the Pension Protection Act.

Taxes and Tax Reform- The Road Ahead

Presented by:

Dean Zerbe
alliantgroup,LP

Dean Zerbe, J.D., LL.M.

National Managing Director- *alliantgroup*- Washington, D.C.



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- Former Sr. Counsel and Tax Counsel, Senate Finance Committee: Involved with almost every major piece of tax legislation
- *alliantgroup*'s ultimate tax policy expert
- Focused on federal and state tax credits and incentives, and U.S. tax policy
- Media "go-to" source for commentary on tax policy and other issues



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Yes No



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How can alliantgroup® serve you?



Who are we?

- National Consulting Firm
- Focused on supporting CPA firms nationwide
- **alliantgroup** - Houston (national office), New York, Boston, LA, Atlanta, Orange County, San Francisco, San Diego, Seattle, Chicago, Toledo, Denver and Miami
- **alliantgroup** - Has over 300 professionals nationwide
 - Former “Big Four Partners” and Managers
 - CPAs and Attorneys
 - Scores of engineers, chemists, biologists and other technical/scientific
- **alliantgroup** - Only specializes in government sponsored incentive programs.
- **alliantgroup** - Works with CPA firms
 - Be your back office
 - Introduce specialized tax incentives to your clients

BOARD- Governors Riley and Bond; Congressmen Lazio and Ramstad

Over 10,000 R&D studies

Mark Everson joins



- Served as Commissioner of Internal Revenue from 2003 until 2007
- Appointed Vice Chairman for alliantgroup
- Will advise alliantgroup on strategic, operational, and

"Many companies do not take advantage of all the tax incentives to which they are entitled. alliantgroup can help. Based on my meetings with alliantgroup personnel and a number of the accounting professionals with whom they work across the country, it is clear the firm has achieved a great deal since its founding and is well positioned for further expansion." – Mark Everson

Hon. Jim Ramstad joins



- alliantgroup Senior Adviser
- Former Congressman from Minnesota (1991-2009)
- Member of the House Ways & Means Committee
- Authored numerous pieces of tax legislation
- Former Minnesota State Senator
- Focused on the needs of small and mid-sized business

Christopher S. "Kit" Bond joins



- Served as Chairman for the Committee on Small Businesses and Entrepreneurship and as Vice Chairman of the Senate Intelligence Committee.
- Elected to statewide office a total of seven times, Bond also served as Missouri State Auditor (1971-3) and two terms as Governor of Missouri
- Most recently representing the state of Missouri for four terms in United States Senate (1985-2011)
- As alliantgroup Senior Advisor, he will advise on strategic initiatives to educate small and medium-sized Missouri businesses about valuable tax credits and incentives, as well as increase jobs in areas of high unemployment.

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with your vital work**

alliantgroup, LP is an independent consulting firm that works with CPA firms and their clients to ensure they receive the full benefit of all available Federal and State government sponsored incentive programs, such as the Research and Development tax credit, the Extraterritorial Income Exclusion, the IC-DISC, the Domestic Production Deduction, the Training Credit, and Enterprise Zone Incentives.

For more information, visit our website at:

www.alliantgroup.com

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