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Quick Bite: March 17, 2010 UBIT Issues

11:00 a.m. – 12:00 p.m. EST

Speaker: Kevin Fincher

This session will cover the most recent UBIT issues impacting credit unions. Topics covered will include a discussion on how recent litigation matters will impact your reporting requirements, IRS audit update, best practice advice regarding the Form 990 information reporting and revisions to the 2009 form. Additionally, it will cover items that have been receiving increased scrutiny by IRS and state taxing jurisdictions. Examples include volunteer and employee taxable fringe benefits, lobbying and political involvement, and sales and use tax.

Speaker: Kevin Fincher is a Tax Partner in Clifton Gunderson LLP's Phoenix office. Kevin has more than twelve years of experience in public accounting, dealing with a wide range of tax and industry topics, including financial institutions. He has worked closely with many credit unions and credit union leagues across the country throughout his career.

Kevin's credit union expertise focuses on unrelated business income tax (UBIT), cost allocations, IRS procedures and practices, and compliance with changing information reporting requirements. Additionally, Kevin has experience in sales and use tax and employment related tax issues. He has successfully defended credit unions before the IRS on each of the aforementioned issues.

Kevin is a Certified Public Accountant and is licensed in Arizona and New Mexico. He is currently a member of American Institute of Certified Public Accountants, the Arizona Society of Certified Public Accountants and the New Mexico Society of Certified Public Accountants.

Location: Via Telephone (11:00 a.m. to 12:00 p.m. EST)

Educational Investment: \$109.00 per telephone connection. *Unlimited Listeners and Free Audio Archive*

******You must be registered for this session to hear the audio-recorded version and receive handouts.******

AUDIO ARCHIVE! Can't tune in today? This session will be available on-line for **30** days after activation.

To enroll, you may complete and fax our **General Registration Form** (found on the Web site) or **send an Email to mzelinsky@njcul.org**. Please include Participant Name(s) and Cost to your credit union.

If you have any additional questions, please do not hesitate to contact the Education and Training Department at 609-448-2426 x100.