



# TEI Newsletter Chicago Chapter

November 21, 2012  
Issue 2

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## A Message from the President

Dear Fellow TEI Members,

It seems impossible to me that the holidays are once again upon us. How did it happen that yet another year is fast coming to a close?

The Chicago Chapter had a full plate (pardon the Thanksgiving pun) of activity this fall. We kicked off the season in October with a Federal meeting filled with planning ideas for coming out of a downturn economy. Also in October we held our first State Meeting focused on state audit issues best practices. The session was followed by a Q&A with the Illinois Department of Revenue. In November, we held our annual full day International Meeting which played to a sold out crowd. Finally, we held 2 full day Accounting for Income Tax workshops, which both sold out, as well.

The tentative slate of all upcoming meetings can be found on page 2. Many of the Spring meetings are still in the planning stages, so keep your eyes on your in-box for more information as it develops.

TEI upgraded the website [www.tei.org](http://www.tei.org) in late November. This added a new front page and hopefully some improved functionality. Please find the time to check out the web-site not only for Chapter information, but for national advocacy and education information

TEI National held its Annual Meeting in San Francisco at the start of November. The Chicago Chapter had a great turnout and lots of participation from its Committee Chairs moderating sessions. The Mid-Year conference will be in Washington DC April 30 – May 4. Check the web-site for more details as they develop.

The next Chapters meeting covering Uncertain Tax Positions (Schedule UTP) will be held on December 6<sup>th</sup> at the Illini Center on Wacker Drive. The session will be hosted by the University of Illinois MST Program. The featured speakers are Michael Desmond from Bingham McCutcheon and Ken Kuykendall from PWC, but it is our hope that attendees will bring their real-life experience to the meeting and make this one of our more interactive meetings. If you have a question or comment that you would prefer remain anonymous, please send it to Madeline Schneider at [madeline.schneider@brunswick.com](mailto:madeline.schneider@brunswick.com) or Michelle Ley at [michelle.ley@aon.com](mailto:michelle.ley@aon.com).

Happy Holidays!  
Rita Makaris

## TEI Chicago Chapter Meetings 2011-2012

Date	Topic	Hosted By	Estimate CLE/CPE
December 6, 2011	Uncertain Tax Positions- Panel Discussion	Binghan McCutchen & PWC	3
February, 2012	Audit Planning for Litigation	Mayer Brown	3/4
March, 2012	Chief Tax Officer Forum	TBD	TBD
April, 2012	Reorganizations and Sub C	TBD	TBD
May, 2012	State & Local Tax Topics	TBD	TBD
June, 2012	TEI Chicago Annual Meeting and Social Event	TBD	NA

## National Continuing Education Calendar 2011-2012

Dates	Day of Week	Topic
<b>2012</b>		
February 21 -23	Tues - Thu	IRS Audits and Appeals Seminar (with Foreign Audits Day) Location TBD
March 25-28	Sun - Wed	62nd Midyear Conference Grand Hyatt Washington - Washington, DC
April 30-May 4	Mon-Fri	Federal Tax Course - Level I Michigan State University - East Lansing, MI
May 22-24	Tue-Thu	State & Local Boot Camp Location TBD
June 14-15	Thu-Fri	Federal Tax Seminar Location TBD

## Committee Participation Opportunities

The Chicago Chapter Board invites participation by interested members on our committees. This is a great way to become more involved at the Chapter and National levels of TEI. The committees plan our programs. Committees also work with the TEI National committees to provide input and assistance on advocacy submissions related to changes in tax legislation and regulations. Committee members participate in our periodic Chapter Board meetings and can progress to leadership roles as chairs or chapter directors and officers. Local Chapter committee chairs are also members of the corresponding National TEI committees. The Chicago Chapter is very involved at the National level and represents the chapter members in the TEI National process.

Interested members should contact the committee chairpersons listed at the end of this newsletter or Rita Makaris at [rita.makaris@som.com](mailto:rita.makaris@som.com) or by calling 312-360-4475.

## Illinois DOR Contact information

At the recent State audit session, our speaker from the State of Illinois was asked for the contact information for the staff at the audit department. This information is listed below.

Dan Hall, Manager	<a href="mailto:daniel.hall@illinois.gov">daniel.hall@illinois.gov</a>	217 782-9800
Charles K. Campbell, Income Tax Division Manager	<a href="mailto:charles.k.campbell@illinois.gov">charles.k.campbell@illinois.gov</a>	847 894-7957
Roger Koss, Sales Tax Division Manager	<a href="mailto:roger.koss@illinois.gov">roger.koss@illinois.gov</a>	217 785-2785
Ray Stout, Audit Support Division Manager	<a href="mailto:ray.stout@illinois.gov">ray.stout@illinois.gov</a>	217 524-2554
Steve Kreiter, Sales Tax Assistant Division Manager	<a href="mailto:steven.kreiter@illinois.gov">steven.kreiter@illinois.gov</a>	847 294-4167
Jim Irwin, Sales Tax Assistant Division Manager	<a href="mailto:james.irwin@illinois.gov">james.irwin@illinois.gov</a>	217 785-0514
Brian McGrail, Income Tax Assistant Division Manager	<a href="mailto:brian.mcgrail@illinois.gov">brian.mcgrail@illinois.gov</a>	201 845-0255
Lorna Turner, Income Tax Assistant Division Manager	<a href="mailto:lorna.turner@illinois.gov">lorna.turner@illinois.gov</a>	312 502-9281

## Chapter Scholarship Award

TEI Chicago Chapter awarded a scholarship to Christian Haverney at the University of Illinois MST Program. Christian is a tax accountant in the Chicago office of the German-based accounting & tax advisory firm of Rodl Langford de Kock, LLP.

## Employment Committee

The Employment Committee is available to all TEI members. It provides a central forum to assist unemployed members in finding permanent or temporary work.

If you are unemployed and would like assistance in your search for a permanent position, know of a senior tax position opening, or have something to contribute regarding employment assistance to fellow members, please contact one of the following committee members. You may contact Don Adler [dadler@cfindustries.com](mailto:dadler@cfindustries.com) (847-307-2662) or Bob Gainer [robert\\_j\\_gainer@sbcglobal.net](mailto:robert_j_gainer@sbcglobal.net) (312-648-9307)

*Do you need a Tax Professional for a project or other outsourcing work?*

The Committee also encourages member companies to utilize TEI members who are in transition to satisfy their company's tax-related outsourcing needs. Member companies can be assured of a high level of professional expertise when using the services of fellow TEI members who are in transition. Member companies may contact the committee members to obtain a current list of TEI members who are in transition and available for temporary work assignments.

## Members in transition

Meeting fees are waived for members in transition.

## Tell us if your Email changes!!

In the event of an employment change, or a change of office or Email address, members should update their contact information of the TEI website. *Also, notify Chicago Chapter Secretary, Madeline Schneider, so you receive Chapter communications!*

## 2011-2012 CHAPTER MEETING CHARGES AND SEASON PASS INFORMATION

A Full-Year Pass for \$200 covers all of the regular monthly meetings and workshops (including food/refreshments) and also includes both the member and spouse or invited guest for the June Annual Meeting with entertainment. In addition, we are offering a discount to companies who purchase in excess of three season passes. A company purchasing four or more season passes will receive the excess passes at \$150 each. Please note, as in past years, a Full-Year Pass may be used by any employee of the member company (even non-TEI members).

Payments to Tax Executives Institute are not tax deductible as charitable contributions for federal income tax purposes. They may, however, be deductible under other provisions of the Internal Revenue Code.

The form for ordering season passes is attached.

## 2011/2012 Chapter Officers & Directors

President	Rita Makaris	Skidmore Owings & Merrill	rita.makaris@som.com
Vice President	Janice Lucchesi*	Akzo Nobel	janice.lucchesi@akzonobel.com
Secretary	Madeline Schneider	Brunswick Corporation	madeline.schneider@brunswick.com
Treasurer	Mark Fadden	Accenture	mark.j.fadden@accenture.com
Chapter Representative	Matthew Patterson	GATX Corporation	matthew.patterson@gatx.com
Director (2009-2012)	Helena Klumpp*	Baxter International	Helena_klumpp@baxter.com
Director (2010-2012)	Cathleen Stevens*	Brunswick Corporation	cathleen.stevens@brunswick.com
Director (2010-2013)	Paul Grossman	Beam Global Spirits	paul.grossman@beamglobal.com
Director (2011-2013)	Domingo Garcia	AON Corporation	domingo.garcia@aon.com
Director (2011-2013)	Tom Sturomski	CCC Information Services	tsturomski@cccis.com

## 2011/2012 Committee Chairs - Chicago Chapter

Federal/IRS Admin Affairs	Catherine Cappuzzello Becki Kline	APP Pharmaceuticals Abbott Laboratories	ccappuzzello@apppharma.com rebecca.kline@abbott.com
State & Local Tax	Marilyn D. Franson Cathleen Stevens*	Amsted Industries Brunswick Corporation	mfranson@amsted.com cathleen.stevens@brunswick.com
Corporate Tax Management Committee	John Mann* Paul Westman*	Walgreens GKN America Corp.	john.mann@walgreens.com pwestman@gkna.com
Communications & Web Administration	Helena Klumpp*	Baxter International	Helena_klumpp@baxter.com
CPE	Kathleen Wheeler*	Groupon	kwheeler@groupon.com
Membership	John Branstad	RR Donnelley	john.branstad@rrd.com
International	Dorothy Chao* Janice Lucchesi*	Baxter International Akzo Nobel	dorothy_chao@baxter.com janice.lucchesi@akzonobel.com
Financial Reporting	Michelle Ley	AON Corporation	michelle.ley@aon.com

\* National representation

Chicago Chapter  
Tax Executives Institute, Inc.

2011 – 2012 Local Chapter Member Season Pass

NAME(S): \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

COMPANY: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

\_\_\_\_\_

Please indicate number of passes:

*\*Please note that the yearly pass will cover the annual meeting in June 2012.*

\_\_\_\_\_ \$200 fee for a transferable yearly pass (for first 3 passes)

\_\_\_\_\_ \$150 fee for a transferable yearly pass (for more than 3 passes)

\_\_\_\_\_ Amount of check enclosed: \$ \_\_\_\_\_

TEI does not accept credit cards at this time.

Please make selection and return with check.

**MAKE CHECKS PAYABLE TO:**

**CHICAGO CHAPTER TEI**

**MAIL TO:**

Irene Brajner  
6536 Deer Lane  
Palos Heights, IL 60463-2272  
Email – imbrajner@aol.com