

***About the St. Petersburg Free Clinic:***

*For 43 years the  
St. Petersburg Free Clinic  
has provided temporary assistance  
to those in our community  
who need help with food, health care,  
shelter, and limited financial assistance.  
Those who qualify for services  
are basically the "working poor" who fall  
through the cracks of other programs.*

*Visit the Free Clinic's web site to learn more  
at [www.stpetersburgfreeclinic.org](http://www.stpetersburgfreeclinic.org)*



*The Benefit of Experience.*

*701 94th Ave North, Suite 200  
St. Petersburg, Florida 33702  
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[eERISA.com](http://eERISA.com)*

**TENTH ANNUAL TAX & BUSINESS UPDATE  
FOR CPAS AND ADVISORS**

**JUNE 20, 2012  
TAMPA, FL**

**MATTHEWS BENEFIT GROUP, INC.**

HOSTS THE ATTORNEYS OF

**GRAYROBINSON, P.A.**

SPECIAL GUESTS

**ALLTRUST INSURANCE  
ASPIRE FINANCIAL SERVICES**

**7 HOURS OF APPROVED TB CPE CREDIT FOR CPAS  
1 HOUR OF APPROVED AA CPE CREDIT FOR CPAS**

PROCEEDS FROM THIS CPE PROGRAM GO TO SUPPORT  
THE ACTIVITIES OF THE ST.PETERSBURG FREE CLINIC

## MATTHEWS BENEFIT GROUP, INC.

*Located in St. Petersburg, Florida, Matthews Benefit Group, Inc. is an independent actuarial consulting and benefits administration firm.*

*We provide plan implementation, administration and consulting services for a variety of employee and executive plans including:*

### *Retirement plans:*

- 401(k)
- Defined-benefit pension
- Cash balance pension
- Profit sharing
- Nonqualified deferred compensation plans
- 403(b) programs

### *Welfare Plans:*

- Cafeteria plans
- Welfare plan administration and reporting

*We have actuaries, compliance experts, benefits-trained accountants and plan administration specialists. For over three decades we have provided benefits planning and administration for businesses of all sizes, from small companies to major Fortune 500 companies.*

*The firm sells no financial products.*

## PROGRAM

### 10TH ANNUAL TAX AND BUSINESS UPDATE JUNE 20, 2012

#### A STRATEGIC LOOK AT EMERGING BUSINESS TRENDS AND CRITICAL ISSUES IMPACTING YOUR CLIENTS

THIS IS AN ESSENTIAL TAX AND BUSINESS SEMINAR FOR CPAs WITH 8 HOURS APPROVED CPE CREDITS (7 TB & 1 AA).

- + MISCLASSIFICATION OF WORKERS: WHY IT'S A PROBLEM AND HOW TO HANDLE A MISCLASSIFICATION
- + INCOME AND TRANSFER TAX CONSIDERATIONS FOR THE EXITING OR RETIRING BUSINESS OWNER
- + DEFINING DEFERRED COMPENSATION: SATISFYING SECTION 409A
- + EMPLOYEE BENEFITS FOR THE GENERAL TAX PRACTITIONER
- + NEXT GENERATION RETIREMENT
- + THE ONGOING AMERICAN HEALTHCARE COST CRISIS
- + ASC 820 - OVERVIEW OF INVESTMENT VALUATION AND DISCLOSURE FOR RETIREMENT PLANS
- + RETIREMENT PLAN DISCLOSURE AND REGULATORY UPDATE

REGISTRATION: \$75 (IF PAID BY MAY 11), \$95 THEREAFTER.  
LUNCH AND MATERIALS INCLUDED. SEATING IS LIMITED.

#### REGISTER AT:

[HTTP://CONTA.CC/CPE\\_MATTHEWS](http://CONTA.CC/CPE_MATTHEWS)  
OR CALL (727) 577-7000

PROGRAM AND LUNCH AT WYNDHAM TAMPA WESTSHORE

FOR MORE INFORMATION CONTACT STEPHANIE BROWN AT:

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