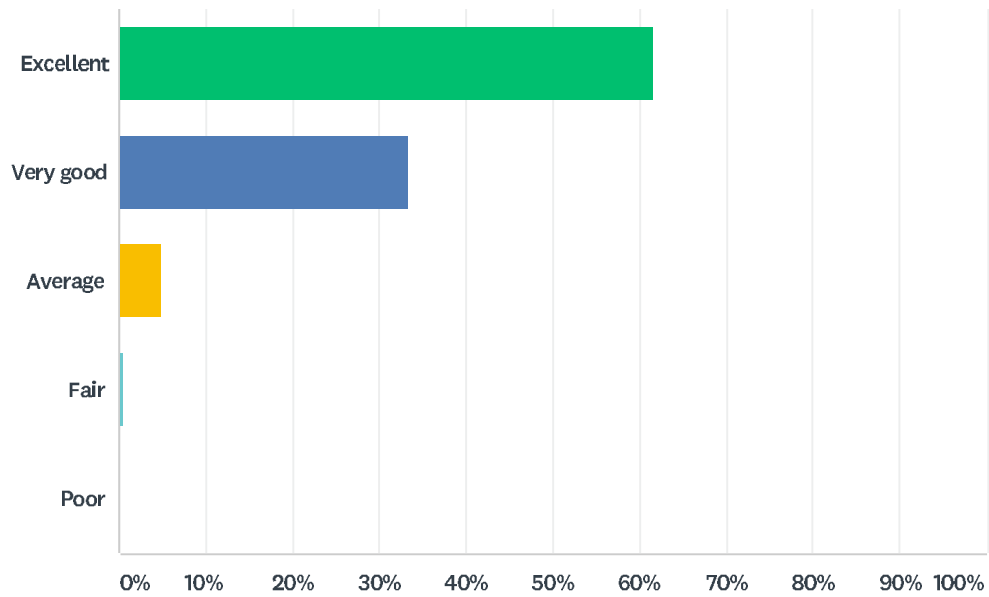


# Q1 How would you rate Owen Van Syckle's knowledge of the topic, How to Defer RMDs?

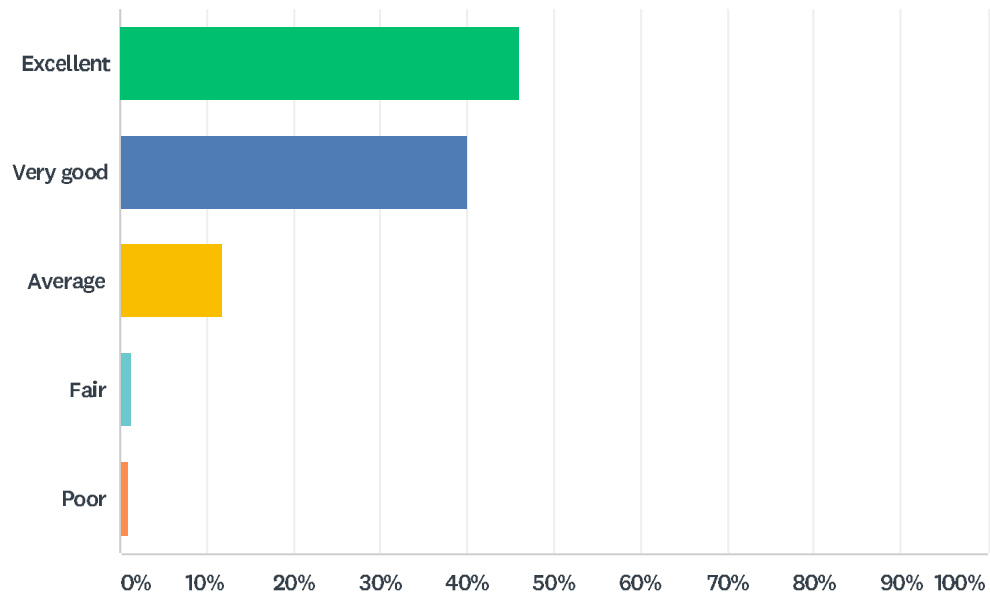
Answered: 231 Skipped: 3



ANSWER CHOICES	RESPONSES	
Excellent	61.47%	142
Very good	33.33%	77
Average	4.76%	11
Fair	0.43%	1
Poor	0.00%	0
<b>TOTAL</b>		<b>231</b>

## Q2 How would you rate Owen Van Syckle's, How to Defer RMDs, material?

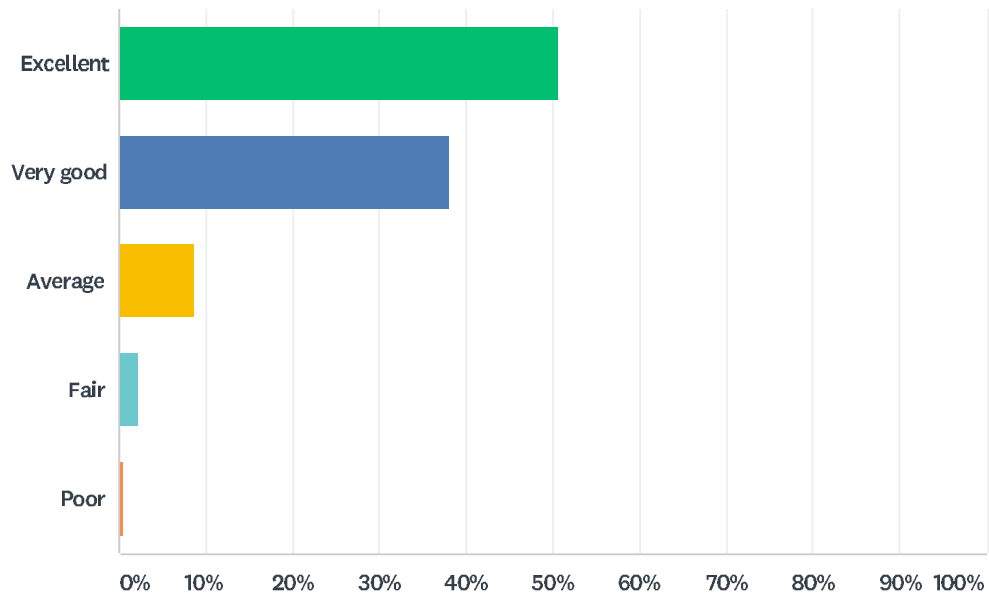
Answered: 230 Skipped: 4



ANSWER CHOICES	RESPONSES	
Excellent	46.09%	106
Very good	40.00%	92
Average	11.74%	27
Fair	1.30%	3
Poor	0.87%	2
TOTAL		230

### Q3 How would you rate the Owen Van Syckle's, How to Defer RMD's, presentation?

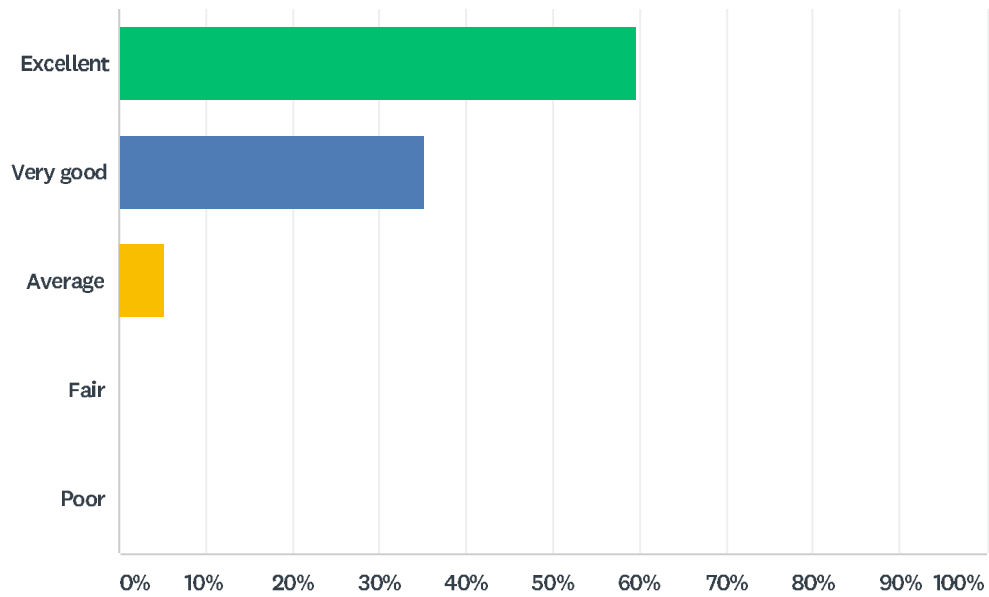
Answered: 231 Skipped: 3



ANSWER CHOICES	RESPONSES	
Excellent	50.65%	117
Very good	38.10%	88
Average	8.66%	20
Fair	2.16%	5
Poor	0.43%	1
TOTAL		231

### Q4 How would you rate the John McDowell's knowledge of the topic, Anatomy of an IRS Audit?

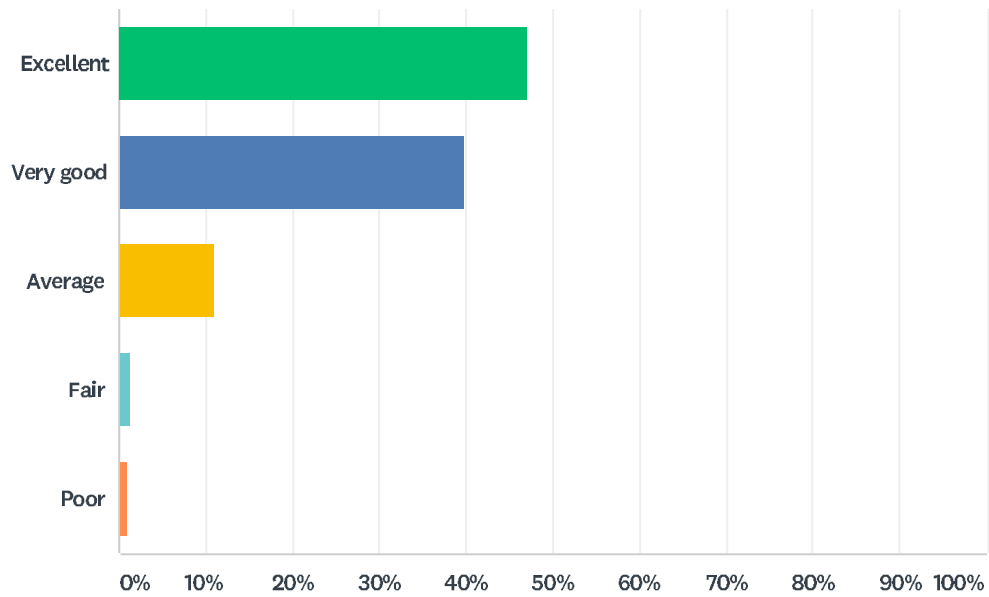
Answered: 228 Skipped: 6



ANSWER CHOICES	RESPONSES	
Excellent	59.65%	136
Very good	35.09%	80
Average	5.26%	12
Fair	0.00%	0
Poor	0.00%	0
<b>TOTAL</b>		<b>228</b>

## Q5 How would you rate John McDowell's, Anatomy of an IRS Audit, material?

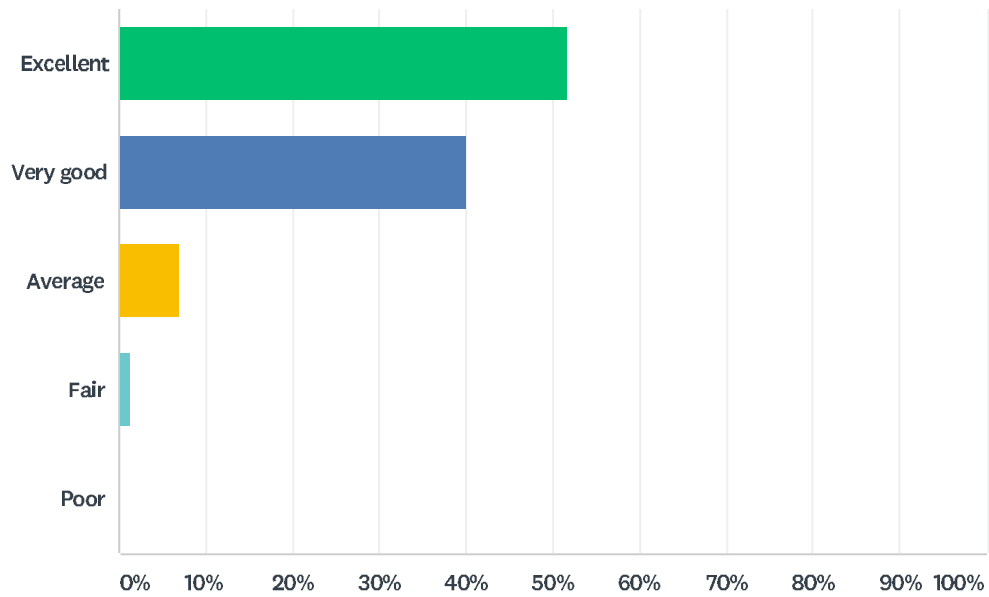
Answered: 229 Skipped: 5



ANSWER CHOICES	RESPONSES	
Excellent	47.16%	108
Very good	39.74%	91
Average	10.92%	25
Fair	1.31%	3
Poor	0.87%	2
<b>TOTAL</b>		<b>229</b>

## Q6 How would you rate John McDowell's, Anatomy of an IRS Audit, presentation?

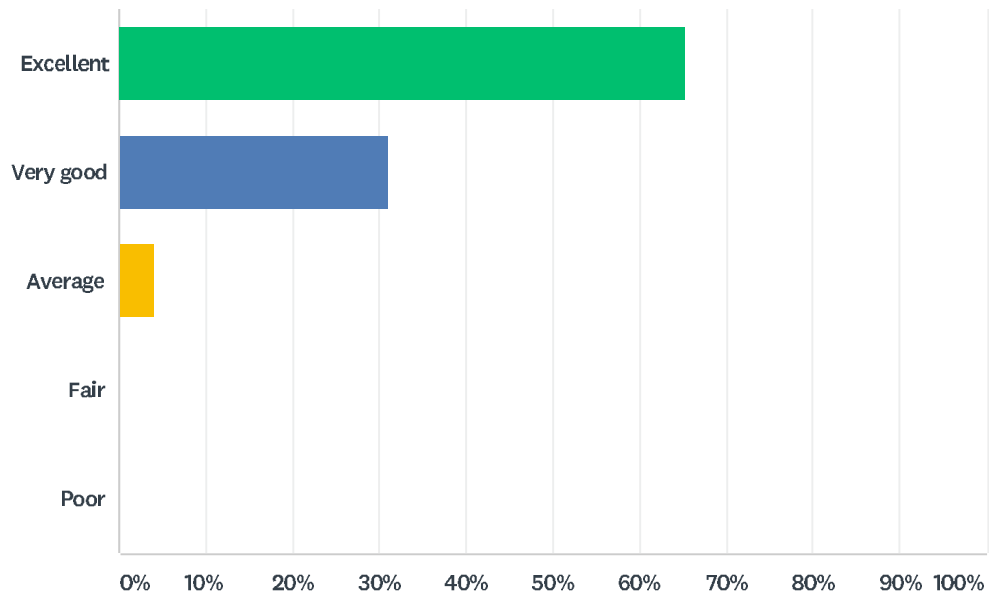
Answered: 230 Skipped: 4



ANSWER CHOICES	RESPONSES	
Excellent	51.74%	119
Very good	40.00%	92
Average	6.96%	16
Fair	1.30%	3
Poor	0.00%	0
<b>TOTAL</b>		<b>230</b>

## Q7 How would you rate Alan Zipp's knowledge of the topic, Tax Affecting S-Corporations?

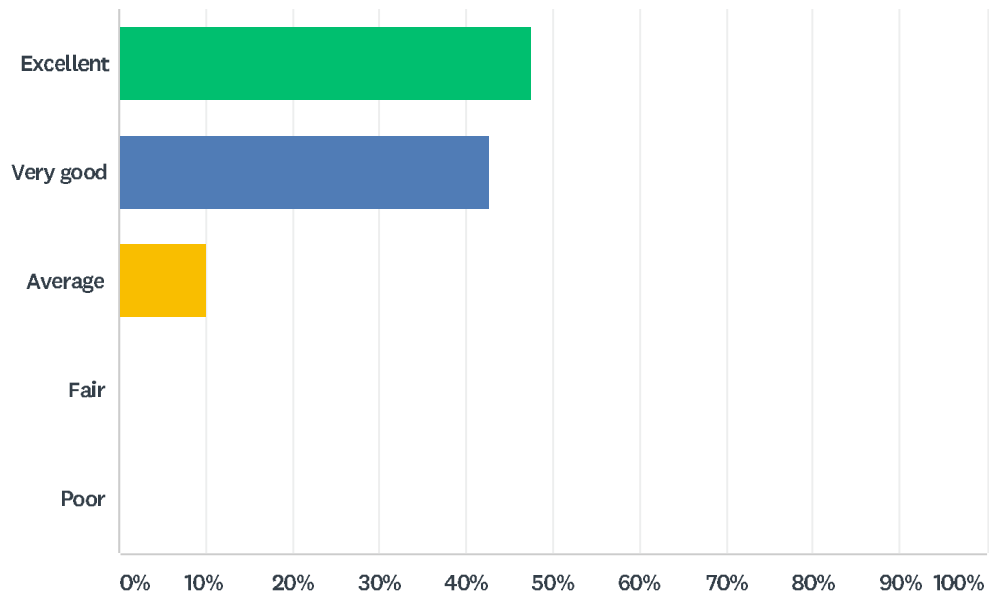
Answered: 230 Skipped: 4



ANSWER CHOICES	RESPONSES	
Excellent	65.22%	150
Very good	30.87%	71
Average	3.91%	9
Fair	0.00%	0
Poor	0.00%	0
<b>TOTAL</b>		<b>230</b>

## Q8 How would you rate Alan Zipps's, Tax Affecting S-Corporations, material?

Answered: 230 Skipped: 4

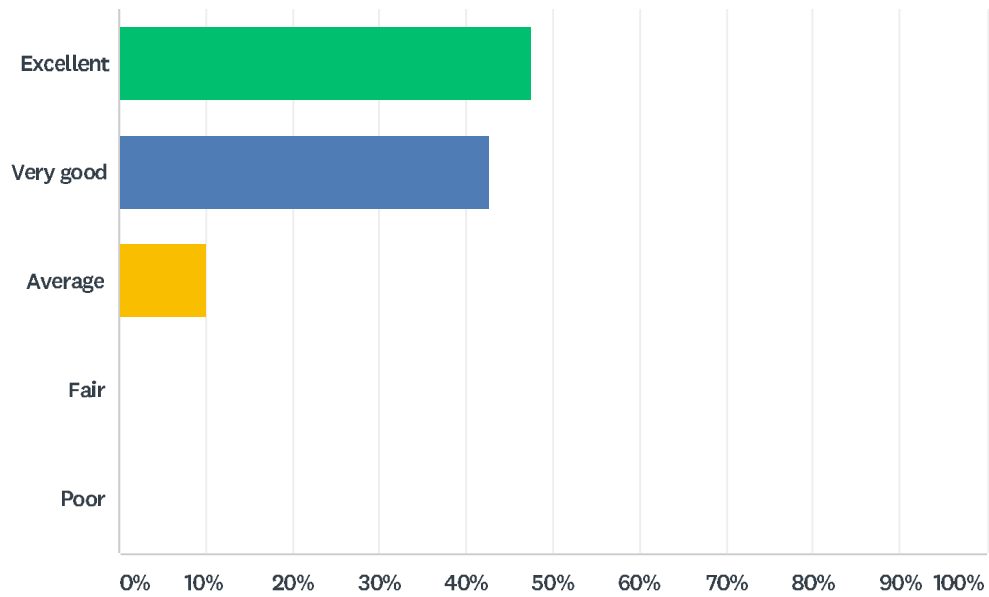


ANSWER CHOICES	RESPONSES	
Excellent	47.39%	109
Very good	42.61%	98
Average	10.00%	23
Fair	0.00%	0
Poor	0.00%	0
<b>TOTAL</b>		<b>230</b>



# Q9 How would you rate Alan Zipp's, Tax Affecting S-Corporations, presentation?

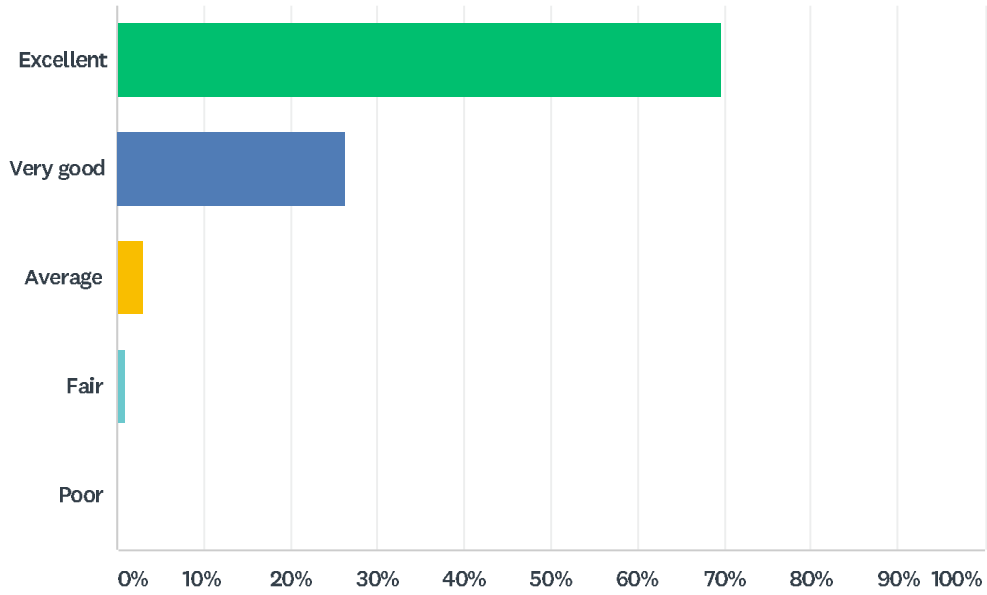
Answered: 230 Skipped: 4



ANSWER CHOICES	RESPONSES	
Excellent	47.39%	109
Very good	42.61%	98
Average	10.00%	23
Fair	0.00%	0
Poor	0.00%	0
<b>TOTAL</b>		<b>230</b>

# Q10 How would you rate Ley Mills' knowledge of the topic, IRS Update?

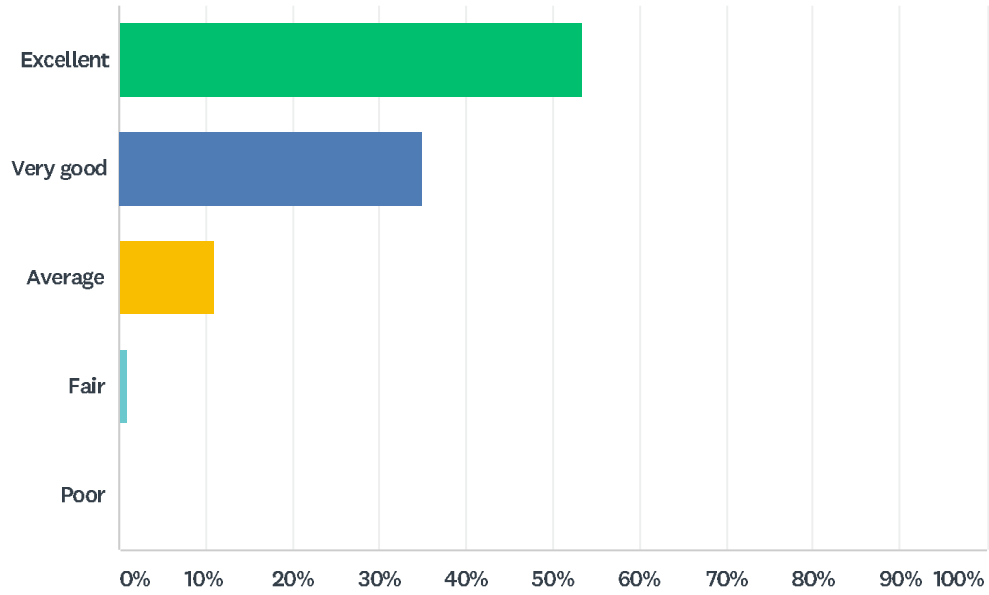
Answered: 231 Skipped: 3



ANSWER CHOICES	RESPONSES	
Excellent	69.70%	161
Very good	26.41%	61
Average	3.03%	7
Fair	0.87%	2
Poor	0.00%	0
<b>TOTAL</b>		<b>231</b>

### Q11 How would you rate Ley Mills', IRS Update, material?

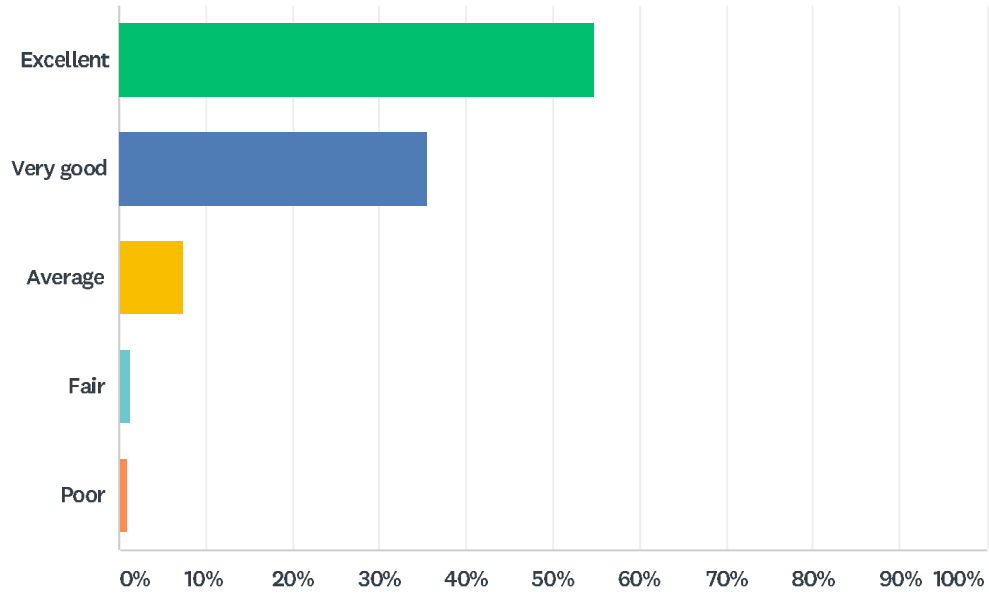
Answered: 229 Skipped: 5



ANSWER CHOICES	RESPONSES	
Excellent	53.28%	122
Very good	34.93%	80
Average	10.92%	25
Fair	0.87%	2
Poor	0.00%	0
<b>TOTAL</b>		<b>229</b>

## Q12 How would you rate Ley Mills', IRS Update, presentation?

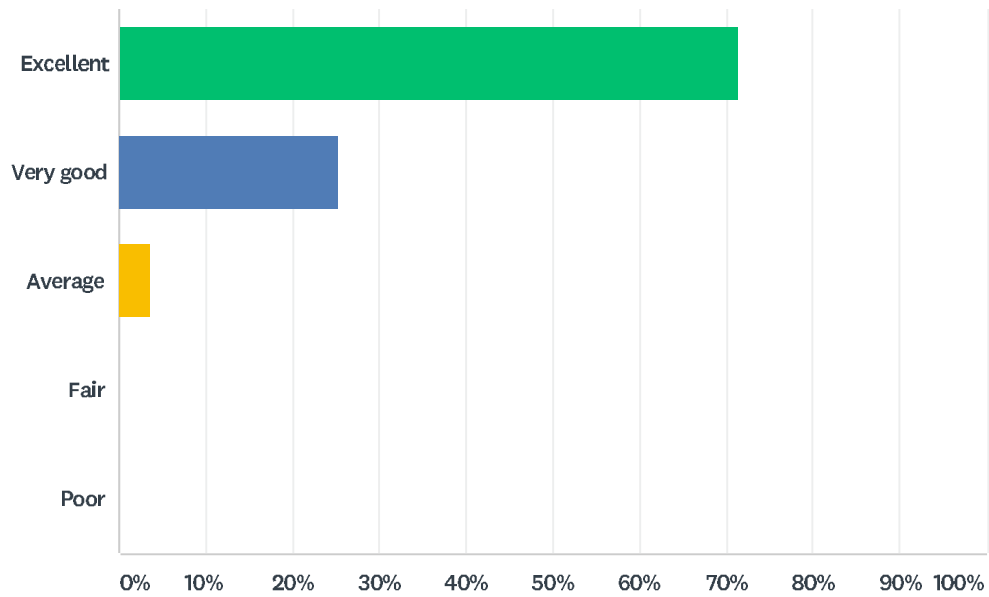
Answered: 230 Skipped: 4



ANSWER CHOICES	RESPONSES	
Excellent	54.78%	126
Very good	35.65%	82
Average	7.39%	17
Fair	1.30%	3
Poor	0.87%	2
TOTAL		230

### Q13 How would you rate Lee Mikelson's knowledge of the topic, VA Department of Taxation Update?

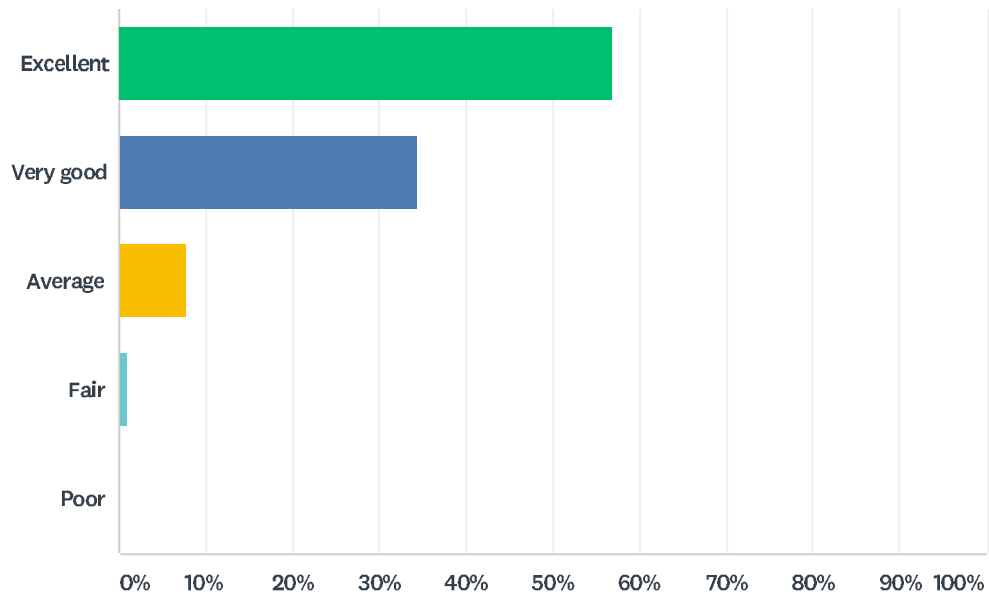
Answered: 230 Skipped: 4



ANSWER CHOICES	RESPONSES	
Excellent	71.30%	164
Very good	25.22%	58
Average	3.48%	8
Fair	0.00%	0
Poor	0.00%	0
<b>TOTAL</b>		<b>230</b>

# Q14 How would you rate Lee Mikelson's, VA Department of Taxation Update, material?

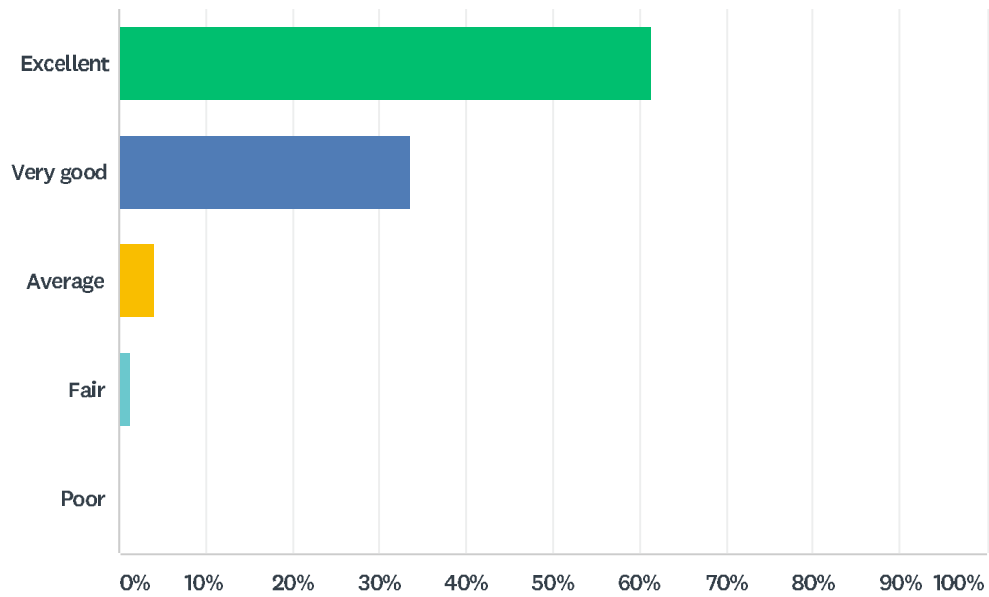
Answered: 230 Skipped: 4



ANSWER CHOICES	RESPONSES	
Excellent	56.96%	131
Very good	34.35%	79
Average	7.83%	18
Fair	0.87%	2
Poor	0.00%	0
<b>TOTAL</b>		<b>230</b>

# Q15 How would you rate Lee Mikelson's, VA Department of Taxation Update, presentation?

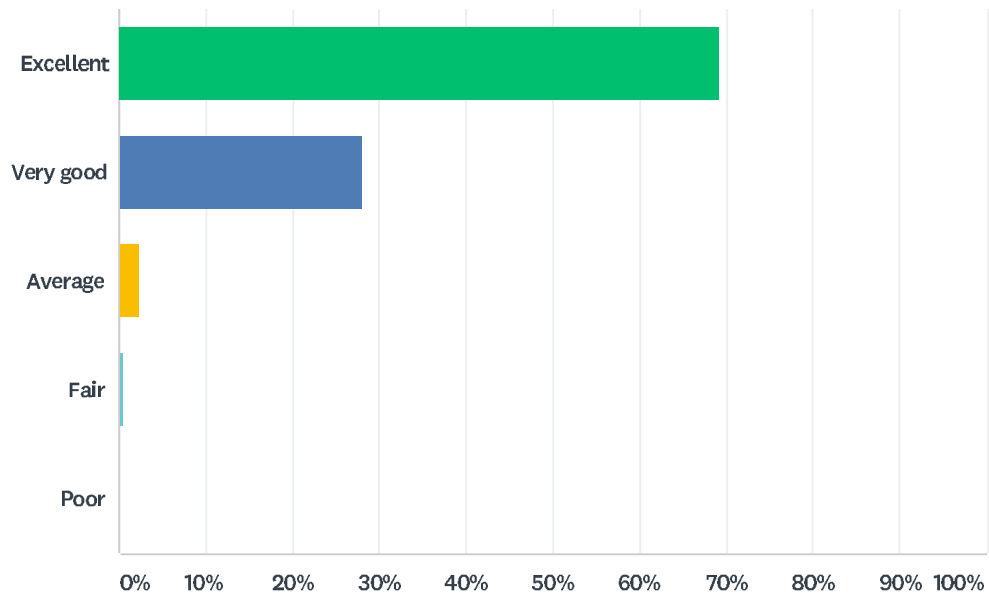
Answered: 230 Skipped: 4



ANSWER CHOICES	RESPONSES	
Excellent	61.30%	141
Very good	33.48%	77
Average	3.91%	9
Fair	1.30%	3
Poor	0.00%	0
<b>TOTAL</b>		<b>230</b>

### Q16 How would you rate E. Diane Thompson's knowledge of the topic; When, Why & How to Say No to an Inheritance?

Answered: 224 Skipped: 10

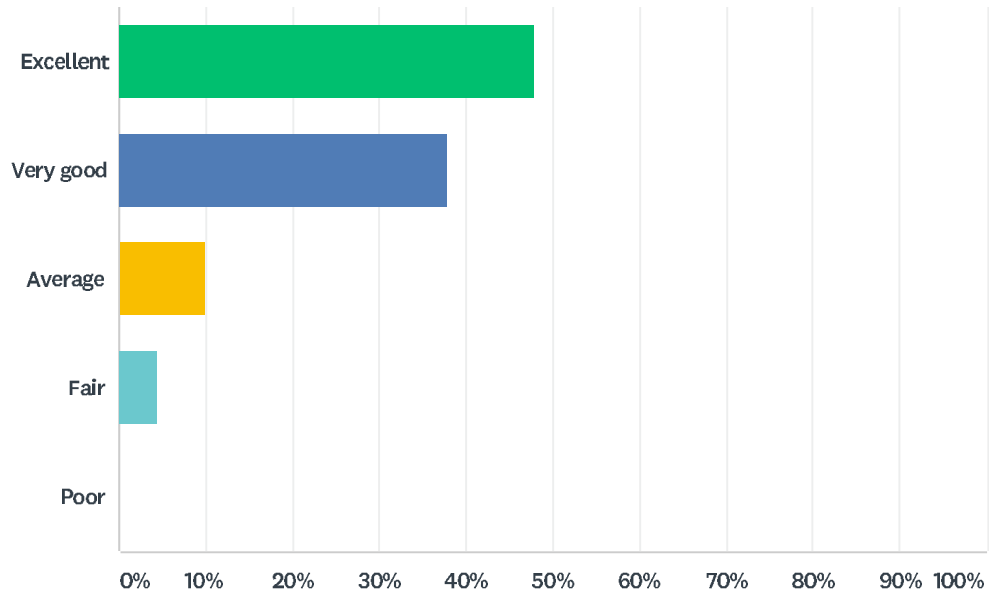


ANSWER CHOICES	RESPONSES	
Excellent	69.20%	155
Very good	28.13%	63
Average	2.23%	5
Fair	0.45%	1
Poor	0.00%	0
<b>TOTAL</b>		<b>224</b>



### Q17 How would you rate E. Diane Thompson's; When, Why & How to Say No to an Inheritance, material?

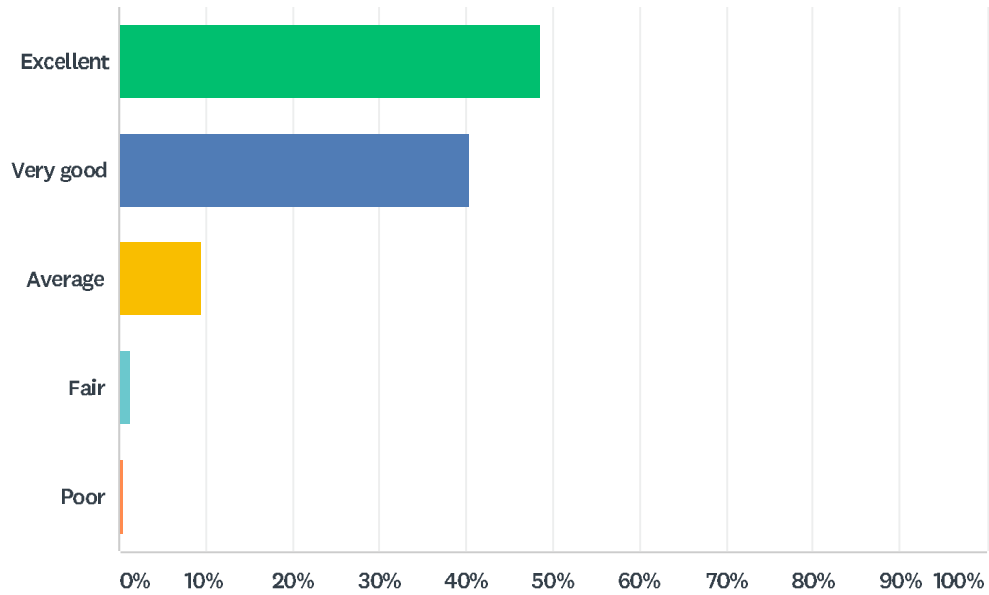
Answered: 225 Skipped: 9



ANSWER CHOICES	RESPONSES	
Excellent	48.00%	108
Very good	37.78%	85
Average	9.78%	22
Fair	4.44%	10
Poor	0.00%	0
<b>TOTAL</b>		<b>225</b>

### Q18 How would you rate E. Diane Thompson's; When, Why & How to Say No to an Inheritance, presentation?

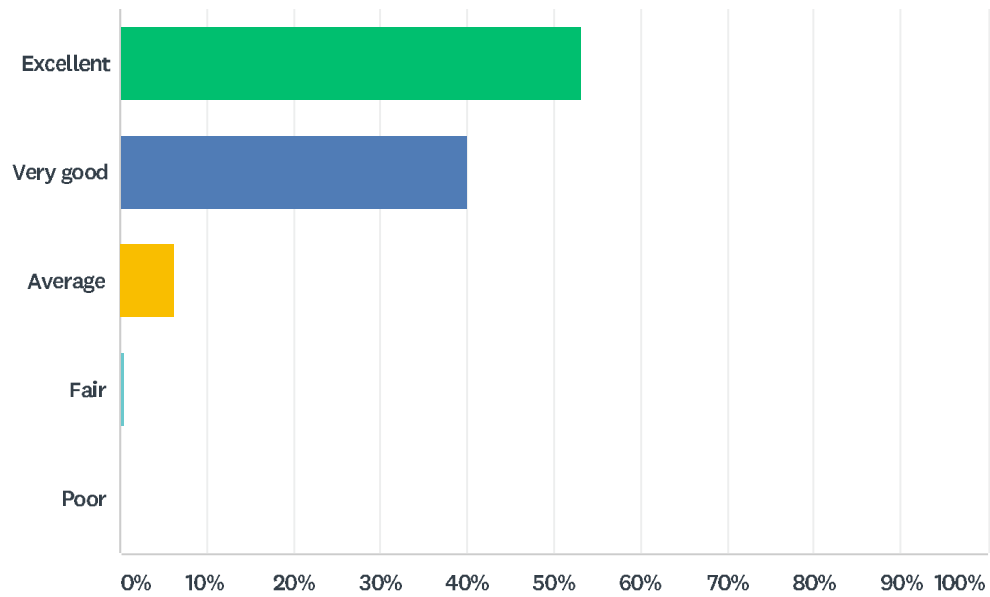
Answered: 225 Skipped: 9



ANSWER CHOICES	RESPONSES	
Excellent	48.44%	109
Very good	40.44%	91
Average	9.33%	21
Fair	1.33%	3
Poor	0.44%	1
TOTAL		225

## Q19 How would you rate Christine Piersall's knowledge of the topic, Post Mortem Tax Planning?

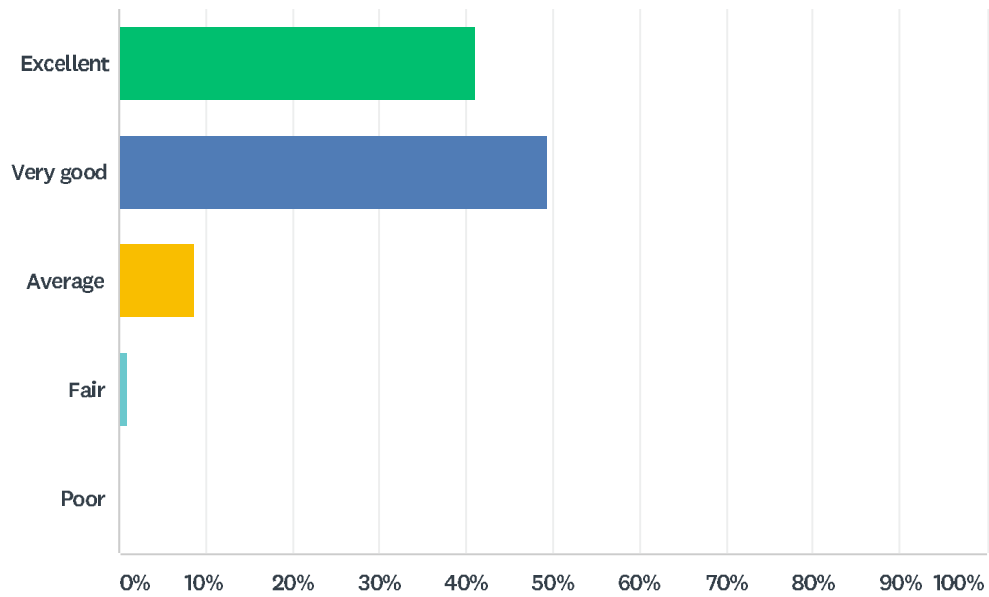
Answered: 220 Skipped: 14



ANSWER CHOICES	RESPONSES	
Excellent	53.18%	117
Very good	40.00%	88
Average	6.36%	14
Fair	0.45%	1
Poor	0.00%	0
<b>TOTAL</b>		<b>220</b>

## Q20 How would you rate Christine Piersall's, Post Mortem Tax Planning, material?

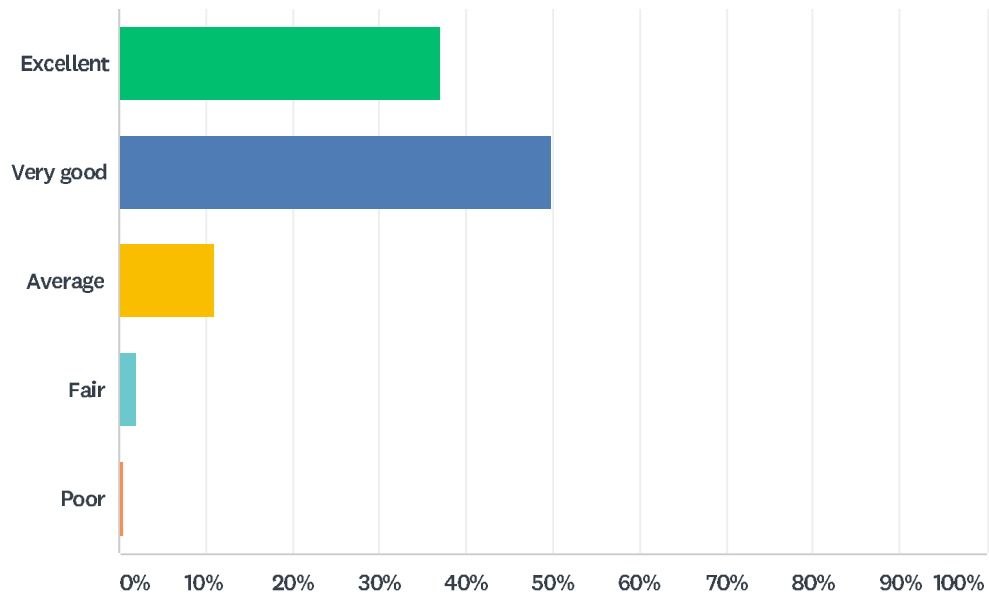
Answered: 219 Skipped: 15



ANSWER CHOICES	RESPONSES	
Excellent	41.10%	90
Very good	49.32%	108
Average	8.68%	19
Fair	0.91%	2
Poor	0.00%	0
<b>TOTAL</b>		<b>219</b>

## Q21 How would you rate Christine Piersall's, Post Mortem Tax Planning, presentation?

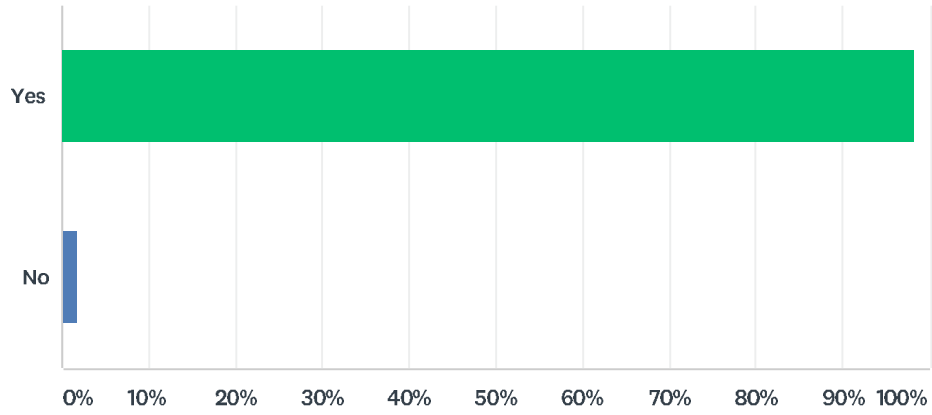
Answered: 219 Skipped: 15



ANSWER CHOICES	RESPONSES	
Excellent	36.99%	81
Very good	49.77%	109
Average	10.96%	24
Fair	1.83%	4
Poor	0.46%	1
<b>TOTAL</b>		<b>219</b>

## Q22 Were the course objectives met?

Answered: 228 Skipped: 6



ANSWER CHOICES	RESPONSES	
Yes	98.25%	224
No	1.75%	4
TOTAL		228

## Q23 Future speaker or topic suggestions?

Answered: 38 Skipped: 196

## Q24 General comments?

Answered: 67 Skipped: 167



## Q24 General comments?

Answered: 67 Skipped: 167

#	RESPONSES	DATE
1	The presentations were very informative.	11/22/2017 7:14 PM
2	I thought this was a great day. I also really appreciated that they gave us more space to walk thru the aisles. Good job!	11/13/2017 3:47 PM
3	A central location. Room and video / audio is well done.	11/13/2017 10:02 AM
4	Let's invite Heather Cole again from the Va Dept of Tax - she does a superior job in presenting and answering questions. This was a MOST excellent Tax Day! Thank you so much for all the planning and implementation!	11/13/2017 9:32 AM
5	N/A	11/13/2017 8:27 AM
6	A bit too much focus on estate related matters, especially with possible changes in to law	11/12/2017 8:56 PM
7	Tax topics can be dry as it is, but when you have speakers that just read the powerpoint slides to us, it makes it mind-numbing....please get speakers that not only know their topics but are seasoned presenters with more interesting presentation skills.	11/12/2017 6:51 PM
8	O	11/12/2017 4:23 PM
9	Overall very good, keep up the good work	11/12/2017 1:59 PM
10	These CPE courses by the Tidewater are well run, organized, good facility and food, and generally interesting and educational. It is a real benefit to the members.	11/11/2017 10:02 AM
11	I would like the sessions to be longer. Sometimes 50 minutes is not enough time.	11/10/2017 9:47 PM
12	Excellent program as always!! Thank you for all of the work and planning that went into this event!	11/10/2017 1:46 PM
13	Great speakers! Very useful information.	11/10/2017 1:41 PM
14	The course should have included discussions on current tax reform/cut proposals.	11/10/2017 11:04 AM
15	The table spacing was better, the temp was better, lots of good questions and interaction this year	11/10/2017 8:46 AM
16	The overall conference content was very informative. I really appreciated having experienced IRS agents and VA Dept of Taxation representatives who were able to help in grasping the inside perspective. This will be very useful in helping clients to see matters from the tax agencies' perspective.	11/9/2017 10:38 PM
17	I am a member of the Richmond chapter - wanted to obtain course materials, but would not be able to log in as I am not a member of the Tidewater chapter. Please advise.	11/9/2017 10:17 PM
18	Room temperature was extremely cold all day.	11/9/2017 6:02 PM
19	I felt that Mr. Mills' presentation was too basic; I'm sure he has a lot of knowledge to share with this group. Ms. Piersall was stuck with the bad time slot, but she did very well with the q & a. Overall, another very informative and well run event. Thank you to the team for your efforts!	11/9/2017 5:29 PM
20	Would like to see more tax related topics= Although the tax planning with life insurance was good prefer tax day to be more IRS oriented	11/9/2017 3:45 PM
21	Is it possible to have electric outlet close to tables	11/9/2017 2:41 PM
22	Graet speakers and Lee did a great job.	11/9/2017 1:34 PM
23	I am in not for profit, but like to attend tax related seminars sometimes to keep up my knowledge in tax. The speakers from the state dept of taxation and the inheritance based ones were interesting. The other topics weren't highly relevant or useful to me in particular. One with more general coverage or 529 plans or something else more broadly applicable would be great.	11/9/2017 12:26 PM
24	None	11/9/2017 11:52 AM

## 2017 Tax Day

25	Overall, I thought all the speakers were excellent and knowledgeable. The topics weren't completely helpful to me personally since they were weighted towards estate/fiduciary issues but I did learn some things.	11/9/2017 11:48 AM
26	This was one of the best tax day's I have attended in recent years. The topics were extremely relevant to our practice.	11/9/2017 11:09 AM
27	I left early and did not hear the last two speakers	11/9/2017 11:07 AM
28	The day was very beneficial for me! Thanks	11/9/2017 10:00 AM
29	I was disappointed this year by the lack of speakers revisiting general tax issues that 95% of the CPA Tax Professionals deal with each year. This could have been a good warm up for the 2018 tax season, but instead was for the most part a waste of my time. I'm sure the board had good intentions when choosing the speakers and topics, but this year they got it wrong in my opinion.	11/9/2017 9:58 AM
30	The seminar had a good variety of topics. The life insurance taxation/deferring RMDs provided an excellent overview on life insurance. The IRS audit topic was very good. And the topics presented by Thompson and Piersall provided some very good information. I am really glad that you are able to keep bringing back IRS rep Ley Mills and VA Dept of Taxation rep Lee Mikelson. I think that presentations from IRS & State are an important staple of the Annual Tax Day.	11/9/2017 9:54 AM
31	Everything was nice except no soft drinks at afternoon break.	11/9/2017 9:32 AM
32	All good presentations this year!	11/9/2017 9:27 AM
33	Great job! Thanks for the hard work.	11/9/2017 9:26 AM
34	The facility, snacks and lunch was excellent	11/9/2017 9:24 AM
35	Good conference. Nice selection of speakers and topics.	11/9/2017 9:17 AM
36	Seating and spacing was much more comfortable this time. Also, the temperature was great! I didn't freeze all day long!	11/9/2017 9:13 AM
37	N/A	11/9/2017 9:05 AM
38	Excellent presenters.	11/9/2017 9:04 AM
39	It would be helpful if all the materials were available 2 days prior to the event. I did not have a couple of sessions because they were not posted when I downloaded the materials. In addition, after I log into my account to view the materials while in class, the materials are unavailable to me there and it asks again for me to log in, even though I am already logged in. Not sure what is going on, but that is what is happening on my device.	11/9/2017 8:49 AM
40	Thank you for the wider spacing between the tables. Very much appreciated.	11/9/2017 8:48 AM
41	Consider having CPE days on Peninsula or Williamsburg area, traffic is always such an issue to arrive at Chesapeake	11/9/2017 8:43 AM
42	I thought the day as a whole was very good. The last two speakers were not as good as their predecessors	11/9/2017 8:43 AM
43	meal was excellent Also happy to see that the tables were spaced out better	11/9/2017 8:40 AM
44	Better breakfast options, soda available in the mornings, more water, maybe put iced tea out as an alternative for non coffee drinkers. Why put sleepy time tea bags out at all? Refill sodas faster. Lots of bottlenecks around food this time.	11/9/2017 8:40 AM
45	I would have liked the IRS Audit presentation to have been a little more in detail.	11/9/2017 8:38 AM
46	Thanks for making more room between the tables.	11/9/2017 8:36 AM
47	Great topics and speakers	11/9/2017 8:34 AM
48	Very good Tax Day, thank you for all the work that goes into creating this day.	11/9/2017 8:33 AM
49	Great conference.	11/9/2017 8:26 AM
50	Good conference this year.	11/9/2017 8:15 AM
51	Well done. I appreciate the meeting coordinator keeping the presentations on time. Temperature was a bit cold. Conference Center does a great job getting 350 people fed in less than an hour. Food is good, but there is actually too much! But probably a "package deal".	11/9/2017 7:10 AM

## 2017 Tax Day

52	Really enjoyed it overall, and hopefully my work schedule next year (I do NFP audits so I'm pretty busy in the fall) will permit me to attend more of these. Since they're free to my firm (WEC pays my dues), I can't be too picky about what I expect subject-matter wise, but as I said in my previous comment, a brief session of basic updates would be helpful. I also noticed in the morning that someone speaking mentioned that not a whole lot of younger professionals attend these events. In my experience (I'm 32 and recently returned to public accounting after leaving in 2012), this is just because most CPA firms offer so much CPE (both in-house and by paying for outside conferences), that the ones offered by the Tidewater Chapter are either redundant to what is learned at other CPE's, or the knowledge is so specific (like a lot of yesterday's material) that it's more than staff/seniors/supervisors need to know. Also, maybe split the day for these full-day conferences into 2 four hour sessions, with more general knowledge covered in one, and more specific knowledge covered in the second. That way, we could sign up for a four-hour CPE if it fits with our needs and schedule.	11/9/2017 3:27 AM
53	Excellent speakers with timely topics! Sound system much better than last conference.	11/8/2017 11:28 PM
54	Very good tax day—don't think the IRS & VDOT updates are worth the time allotted—could be done in 15-20 min. and give more time to tax topics.	11/8/2017 9:04 PM
55	Topics were appropriate but tended to drift to fringe issues covered too glossed over to have as much informative impact as I would like	11/8/2017 6:37 PM
56	Great content this year, keep it coming!	11/8/2017 6:24 PM
57	none	11/8/2017 6:10 PM
58	Great Topics and very knowledgeable speakers	11/8/2017 5:57 PM
59	Thank you for allowing room between rows. Suggest you separate cookies from coffee. Consider offering 1 to 2 credit webinars each month, with Qs to prove CPE, in lieu of or in addition to one-day sessions. Very much appreciate the free CPE but one-day sessions are hard and would prefer to pick and choose topics rather than sitting thru ones that aren't of any interest or relevance to what I do.	11/8/2017 4:20 PM
60	As usual great to hear from state and irs tax representatives - always informative.	11/8/2017 4:10 PM
61	Always a quality event. Thank you	11/8/2017 4:05 PM
62	Owen Van Syckle was basically acting as a salesman for insurance products. His presentation was condescending by treating audience like elementary school aged kids..."write this down". Note this."	11/8/2017 3:52 PM
63	None	11/8/2017 3:41 PM
64	The room was extremely cold. First time in some 40 years I have had to put on my coat. Meal was excellent as always. Excellent event.	11/8/2017 3:40 PM
65	Good conference	11/8/2017 3:03 PM
66	Excellent	11/8/2017 3:01 PM
67	Can't get presentation material on the web site	11/8/2017 2:10 PM

## Q23 Future speaker or topic suggestions?

Answered: 38 Skipped: 196

#	RESPONSES	DATE
1	Social security and taxes	11/22/2017 7:14 PM
2	On Tax day it was good to have actual representatives from state government speak. Would be nice to have more IRS guys (we are overdone on cyber security speeches) talking about hot topics within IRS	11/14/2017 7:38 AM
3	1. Basics of Estate Planning; Estate Tax Return preparation (sample to "walk thru" during a presentation. 2. IRA's - Traditional and ROTH - an overview re: planning, funding, timing, conversions, recharacterizations - pre death / post death ; inheritance pitfalls 3. Continue to have Ley and Lee speak each year!	11/13/2017 10:02 AM
4	Let's invite objective CFPs (Certified Financial Professionals) rather than people who present topics which stand to benefit them financially. EX: Owen's topic on deferring RMDs - that strategy is only helpful to a very small segment of the population AND life insurance companies have a financial incentive to promote these strategies. Go to www.CFP.net and click on Find CFP Professional for a local, objective expert. Some will have areas of specialization to draw upon as well. I can personally recommend Roland Martin for taxation in retirement planning - inherited IRA accounts, IRA rollovers, RMDs, annuity strategies, etc. He is also an independent Registered Representative, which means he is not beholden to any financial services or products companies.	11/13/2017 9:32 AM
5	N/A	11/13/2017 8:27 AM
6	No e	11/12/2017 4:23 PM
7	Always have the state people, and the double time was great. "New tax law"	11/12/2017 1:59 PM
8	N/A	11/11/2017 10:02 AM
9	none. Just continue with getting relevant speakers as you are now doing.	11/11/2017 8:00 AM
10	More S-Corp/Partnership topics, like basis, asset sales and other property transactions.	11/10/2017 9:47 PM
11	helpful to hear from IRS and VA Dept of Taxation each year	11/10/2017 8:46 AM
12	Tax affects on various retirement plans Real Estate Flipping Businesses versus Real Estate Rental property and tax affects on each type of these.	11/9/2017 10:38 PM
13	1-2 day tax update. Bring a well known speaker in. We all pay 300-500 for this now.	11/9/2017 1:34 PM
14	None	11/9/2017 11:52 AM
15	Taxation of online sales, tax planning for individuals, cost segregation, client relations	11/9/2017 11:48 AM
16	100 minutes is too long.	11/9/2017 11:00 AM
17	Small business succession planning/options; FATCA update and foreign filing requirements	11/9/2017 10:08 AM
18	I would like to see more general tax topics. I would guess that 95% or more of the CPA's at Tax Day do not deal with Diane Thompsons topic of Disclaimers. I would have welcomed someone speaking to me about Health Care Insurance and what options are available to people in the individual markets.	11/9/2017 9:58 AM
19	How about an overview of requirements for getting exempt status and filing Form 1023? Also tips on completing Form 990-N, 990-EZ or Form 990 would be interesting. Thank you.	11/9/2017 9:32 AM
20	Comparison of tax preparation software	11/9/2017 9:26 AM
21	N/A	11/9/2017 9:05 AM
22	more on health care	11/9/2017 8:40 AM

## 2017 Tax Day

23	Maybe have at least one short session on general tax updates that CPA's who don't specialize in tax should still know about. Personally, I'm in A&A at a local CPA firm, but I still do prepare some 1040's, 1120's, 1065's, etc. (like most A&A department members) during busy season. It would be good to have a short refresher (30-50 minutes) on things like updates to bonus depreciation, new/updated rules for anything affecting 1040's, corporate tax returns, etc. Even if it was held as a short session before or after the main presentation, I'd find it useful. Some updates were covered through the VA Dept of Taxation session, but an overview of all the major changes would still be helpful for A&A professionals. I really appreciate the free CPE offered by the Tidewater Chapter, but I did see a lot of my former colleagues from a large local CPA firm (WEC) yesterday who specialize(d) in auditing, who would still find basic tax updates like these more useful than just those that are specifically applicable to tax professionals.	11/9/2017 3:27 AM
24	analysis of new tax law	11/8/2017 9:32 PM
25	New tax act if it passes & impact on the budget/debt.	11/8/2017 9:04 PM
26	Federal & VA tax credit programs for business entities.	11/8/2017 7:14 PM
27	none	11/8/2017 6:10 PM
28	no suggestions	11/8/2017 5:30 PM
29	1) S-Corp taxation - maintaining shareholder basis; records to maintain for IRS audit of shareholder basis 2) Partnership taxation - maintaining tax basis and at risk basis; records to maintain for IRS audit of partner basis	11/8/2017 5:15 PM
30	Cryptocurrencies and block chain technology	11/8/2017 4:38 PM
31	Industry concerns-HR, cash flow, excel tips.	11/8/2017 4:20 PM
32	partnership audit rules, tax reform, sales of partnership interests, redemption of partnership interests, tenancy-in-common tax matters, cost segregation	11/8/2017 4:16 PM
33	I would include common tax planning, possibly some more basic and common income and deduction issues. Schedule C planning opportunities, retirement plan options for scorps and sole proprietors.	11/8/2017 4:05 PM
34	Maybe get someone from a commissioner of accounts office to talk about filing inventories and accountings on trusts and estates.	11/8/2017 3:56 PM
35	None	11/8/2017 3:41 PM
36	We should get a general tax update on laws, rulings and cases in the last year.	11/8/2017 3:03 PM
37	None	11/8/2017 3:01 PM
38	No suggestion	11/8/2017 2:10 PM