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Date: October 28, 2009

To: Vice Presidents of Finance and Administration
Tax Coordinators
Auxiliary Organization Financial Managers

From: George V. Ashkar
Interim Assistant Vice Chancellor and Controller
Financial Services

Subject: **2009 Tax Training**

Several weeks ago we contacted your campus to let your staff know about our plans for this year's workshop and to receive their input regarding its content. We are pleased to once again offer training in two important tax areas. This year's training will be delivered via webcast and will include 12 hours of Non-Resident Alien Tax training and approximately 6 hours of Unrelated Business Income Tax training. Non-Resident Alien Tax training will consist of 4 sessions of varying lengths beginning November 2 and ending November 17. The session dates and times and the topics to be covered are provided in the accompanying schedule. We will be welcoming back Donna Kepley and Anne-Marie Burns from Arctic International LLC as our trainers.

Unrelated Business Income Tax training will be provided in a single session in the first week of December. Dale Zuehls from the Exempt Organizations Accounting Group will be returning to conduct that training. Further details regarding the webcast will be provided soon.

We strongly urge your campus, including the auxiliaries, to participate in this year's tax training. The cost of the NRAT webcast will be \$620 per campus and the charge for the UBIT webcast will be \$200 per campus. A Cash Posting Order will be issued to collect these amounts from each participating campus.

Although some campuses expressed a preference for a more compressed NRAT training schedule, in order to control costs we had to spread the workshop sessions over a three-week period. In addition, the CSU will be participating in the second and third sessions with another university. However, the training modules selected were based on feedback provided by the campuses and concerns specific to the CSU will be addressed in the fourth session. To make the training even more relevant to your day-to-day operations, you may email your specific

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San Diego

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San José
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San Marcos
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questions or examples of NRAT situations encountered in the past where additional guidance is desirable to Nikhil Bassi nbassi@calstate.edu.

It is essential that campuses coordinate with auxiliaries to find appropriate meeting space where all participants will gather to view the NRAT webcast during the days and times listed on the schedule. Three days prior to the webcast, participants will have access to the slides via a pre-workshop survey link that will be emailed to all webcast participants. If for some reason participants are not able to participate in one of the sessions, they may view the webcast on their own later as it will be available for 30 days after transmission. You will need to ensure that the chosen location has access to a laptop connected to the internet, a projector, and a Polycom or similar teleconferencing phone. **Only one dial-in per campus is allowed. If there are multiple connections from a campus, additional fees will be charged.** There is no limit to the number of individuals that may participate in the webcast.

Registration for NRAT training is accomplished by returning the "NRAT 2009 Training Form." uploaded on the Systemwide Financial Services Workshop website at <http://www.calstate.edu/financialservices/workshops/index.shtml>, which is also the location where the agenda can be viewed. Please list all the individuals that will be participating in the NRAT webcast and return to Nikhil Bassi at nbassi@calstate.edu no later than Wednesday, October 28, 2009 at noon.

Should you have any questions regarding this training please contact Nikhil either via email or phone (562-951-4697).

We look forward to seeing you.