



# TRADE Winds

The Latest News from Windstar Technologies

Fall 2004

WINDSTAR RELEASES MAJOR WEB-BASED UPGRADE

WINDSTAR LAUNCHES E-NEWSLETTER, A VIEW FROM THE CROW'S NEST

WINDSTAR ISSUED COPYRIGHT ON TREATY NAVIGATOR™ SCREENS

WINDSTAR USERS WEBSITE IMPROVED

WINDSTAR WELCOMES NEW CLIENTS

WINDSTAR INTERFACES WITH A GROWING NUMBER OF ERP SYSTEMS

SEMINARS ON FOREIGN WORKERS PRESENTED AT PAYROLL ASSOCIATION CONFERENCES

AMERICAN PAYROLL ASSOCIATION HONORS GARY AND PAULA SINGER

ABA TAXATION SECTION APPOINTS PAULA SINGER CHAIR OF NEW SUBCOMMITTEE

ALEXANDER HAIG CHARTS INTERNATIONAL TAX TRENDS WITH PAULA SINGER

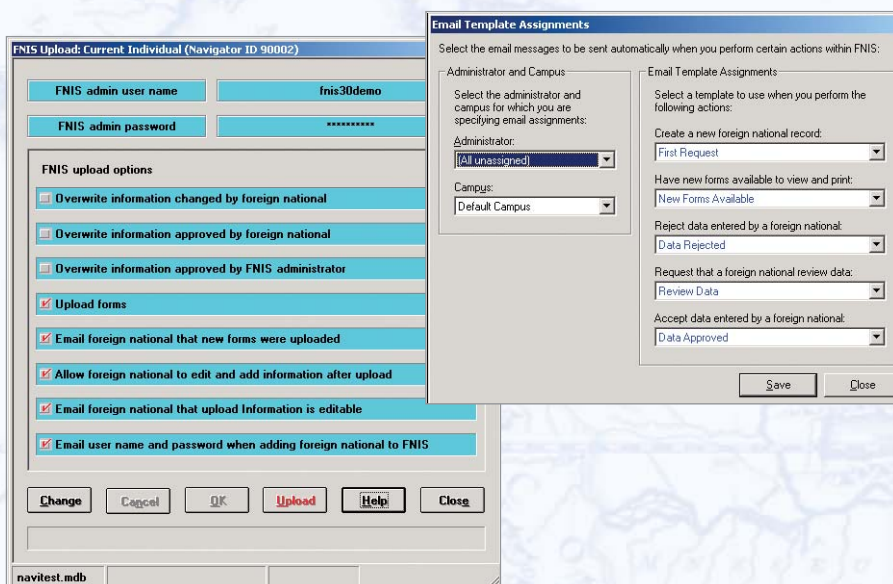
WINDSTAR FEATURED ON NECN AND IN MASS HIGH TECH

WINDSTAR CREW COMINGS AND GOINGS

If you would like to receive an electronic version of *TradeWinds*, please go to [www.windstar.com](http://www.windstar.com) and register at "Join Our Mailing List."

Welcome to the Fall, 04 edition of *TradeWinds*. We'll bring you up-to-date on the latest news on products, clients, and staff at Windstar.

Gary & Paula Singer



## WINDSTAR RELEASES MAJOR WEB-BASED UPGRADE TO FNIS™ — FOREIGN NATIONAL INFORMATION SYSTEM™

Windstar's web-based *Foreign National Information System (FNIS™)* saves you time and money by having foreign national students, workers and exchange visitors enter their data via the web. *FNIS 3* does more than collect this data – now you can deliver it from *Tax Navigator®* to your *FNIS* website with ease. If your institution interfaces *Tax Navigator* with your ERP HR/Payroll system — PeopleSoft, SCT Sunguard or Oracle — you'll love how the data can be sent through *Tax Navigator* to *FNIS* where foreign nationals can review their records.

Sending pre-filled forms and data from the *International Tax Navigator®* to your website is a snap with *FNIS 3*. From there foreign nationals can then download and print completed forms 8233, W8BEN, etc. for signature

and submission for correct and timely processing of exemptions. Administrators can easily generate customized emails for any situation requiring communication with foreign nationals in the system. Following approval by your administrator, your data resides in your database available to you on your system for analysis and reporting. For an additional fee, data can be entered via the web to a database on your own server for added security.

## WINDSTAR LAUNCHES E-NEWSLETTER, A VIEW FROM THE CROW'S NEST

Windstar has launched its bi-monthly electronic and print newsletter, *A View from the Crow's Nest: Windstar's Eye on the Horizon*, an educational and informative look at cross-border individual tax issues. Paula Singer, Windstar CEO and co-founder and recognized international tax lawyer, tackles such topics as "Tax Rules of the Road," "Rules of Residency," and "Income Tax Treaties." Each issue also provides the answer to one of Windstar's frequently asked questions, ranging from when a foreign national is eligible for different types of payments to when a taxpayer identification number is required. *Immigration Daily* and *Immigrant's Weekly* have been reprinting many of the articles.

*The Crow's Nest* is a nautical term for the lookout station at the highest practicable point aloft in a sailing vessel. Exact origin of the term is unknown, but one guess is that some Norse vessels carried ravens in cages; when in doubt as to the whereabouts of land, the skipper ordered the cages hoisted aloft and the birds released, and then followed their direction to shore.

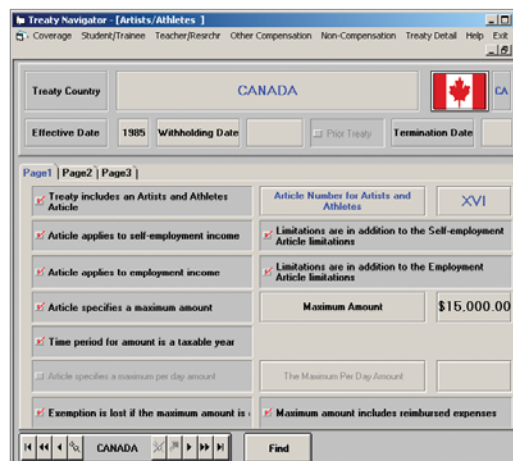
To sign up for the electronic version of *The Crow's Nest*, visit [www.windstar.com](http://www.windstar.com) and join our mailing list. Previously published editions are also available.



## WINDSTAR ISSUED COPYRIGHT ON TREATY NAVIGATOR™ SCREENS

The U.S. Patent and Trademark Office issued Windstar Technologies a copyright on the *Treaty Navigator* screens on April 17, 2004. The *Treaty Navigator* (formerly called the *Treaty Inquiry*) contains a wealth of information for *International Tax Navigator* licensees.

The *Treaty Navigator*, which can be accessed by clicking on the book icon in the *Tax Navigator* files, is an easy-to-use tool for understanding the specific provisions that are in Income Tax Treaties. The *Treaty Navigator* includes over 20 screens illustrating benefits by treaty country. If a country's treaty includes a benefit, the short explanation of the benefit attribute is in bold and checked.



The *Treaty Navigator* also includes the treaty text in an easy-to-read format, which can be printed out. All treaty topical provisions (called "articles") are in the same order with consistent article names. For example, Dependent Personal Services articles, also called Employment Income articles, are named Income from Employment. The actual treaty article number and article name, if any, follow. If a treaty lacks an article, that is noted under the standard article name. The treaty country name follows the term "Contracting State" throughout for ease of understanding. Information from Treasury Explanations follows the article when necessary to clarify the treaty benefits.

The *Treaty Navigator* includes extensive helps. Users need only to right click on a screen statement or the help tab to view easy-to-understand explanations for the treaty provisions.

## WINDSTAR USERS WEBSITE IMPROVED

A wealth of material is available to Windstar licensees just by clicking the sun icon in the Windstar *Tax Navigator* folder. Windstar staff members have been hard at work adding answers to hundreds of frequently asked questions and resources such as frequently referenced IRS and immigration regulations. Answers to questions are provided by experts Paula Singer, Esq., Linda Dodd-Major, Esq., Terri Crowl, NRA Tax Coordinator at George Mason University, and IRS International Specialist, Lowell Hancock. An extensive index is now available as well as enhanced searching capabilities. Also included is information on the *Tax Navigator* and *FNIS* systems upgrades.

## WINDSTAR WELCOMES NEW CLIENTS

Argonne National Labs, Broward Community College, Calvin College, Colorado School of Mines, Columbia University, Dickinson College, Florida Atlantic University, Florida Community College at Jacksonville, Franklin W. Olin College of Engineering, Grinnell College, Los Alamos National Laboratory, Maine Medical Center, Marlboro College, National Renewable Energy Laboratories, New England Conservatory of Music, New York University, Northeastern Ohio Universities College of Medicine, Otis College of Art & Design, Philadelphia University, Presbyterian College, Salk Institute, Southern Connecticut State University, Southern Polytechnic State University, St. Francis College, Stowers Institute for Medical Research, The Brookings Institution, The Forsyth Institute, University of Colorado at Boulder, University of Denver, University of Florida Research Foundation, University of Massachusetts Boston, University of Notre Dame, University of Oklahoma Health Science Center, University of Texas at Brownsville, University of Texas System Medical Foundation, Van Andel Institute, Wayne State University, Western Kentucky University.

## WINDSTAR INTERFACES WITH A GROWING NUMBER OF ERP SYSTEMS

The true measure of an efficient, automated system is how well the system interfaces with existing processing systems. Windstar has been working with users and

enterprise resource planning (ERP) alliance and technical staff for almost 10 years to provide interfaces between *Tax Navigator* and HR/Payroll Systems. Windstar clients using standard interfaces have exported immigration information, demographics, and payments into files for importing into the *Tax Navigator* since its introduction in 1996. With the introduction of the Oracle HR/Payroll interfaces in 1998, ERPs began to use control data passed from *Tax Navigator* analyses to tell the paying systems "What To Do" for payments to foreign nationals. Most recently, Windstar introduced a two-way interface with PeopleSoft's HR/Payroll System 8.0 and 8.3. Upgrades 8.8 is in process. Two-way interfaces are anticipated to be fully functioning with SCT/Banner and Lawson HR/Payroll soon. Windstar is working with a growing number of ERPs –Datatel and SAP among others to provide interfacing capabilities with paying and immigration systems. Watch for announcements on new interface products on the Windstar website [www.windstar.com](http://www.windstar.com), click on Alliances/Interfaces.

## SEMINARS ON FOREIGN WORKERS PRESENTED AT PAYROLL ASSOCIATION CONFERENCES

Windstar CEO and co-founder and nationally recognized international tax lawyer, Paula Singer, and Linda Dodd-Major, immigration lawyer and former Director of INS' Business Liaison Office, presented a seminar on **Understanding Payments to Foreign Workers** at the American Payroll Association's Annual Congress at the Grand Ole Opry Hotel in Nashville. At the prize give away, Paula presented a copy of her book, *Tax Treaty Benefits for Foreign Nationals Performing U.S. Services*, to winner Rochelle Hawley, Payroll Manager at Caesars. Casinos not only have to comply with rules regarding foreign employees but also rules governing foreign gaming winners.

Paula joined with payment expert Jerri Langer to present **Understanding Payments to Foreign Service Workers** at the 1st annual conference of the National Association of Tax Reporting and Payroll Managers in Mystic, Connecticut in August. Corporations must also now grapple with compliance with these complex rules in order to satisfy the IRS with its increasing number of audits and the SEC with its Sarbanes-Oxley requirements.

## AMERICAN PAYROLL ASSOCIATION HONORS GARY AND PAULA SINGER

The American Payroll Association presented Gary and Paula Singer with Citations of Merit at their Annual Congress. Both received a citation for speaking at the 2003 Educational Institutional Payroll Conference in New Orleans. In addition, Paula received citations for speaking at the Global Payroll Management Conference and at the 2004 APA Congress, and for participating on the Educational Institutions Payroll Conference Planning Committee.

## ABA TAXATION SECTION APPOINTS PAULA SINGER CHAIR OF NEW SUBCOMMITTEE

Paula Singer, a long-standing member of the American Bar Association, was recently appointed Chair of Cross-border Individual Tax Issues, a new subcommittee of the Taxation Section International Committee. ABA Taxation committees offer comments on tax legislation and present proposals for improving IRS regulations and procedures. Paula has been commenting on these matters personally for years. Her comments on proposed regulations under section 7701(b) in 1991 and section 1441 in 1994 were incorporated into the final regulations. The establishment of this new subcommittee illustrates the importance of such matters to a broader base of employers, payers, and taxpayers.

## ALEXANDER HAIG CHARTS INTERNATIONAL TAX TRENDS WITH PAULA SINGER

General Alexander Haig, former Secretary of State for President Reagan, discusses **Tax Rules for Foreign Nationals** with Paula Singer, Esq. on World Business Review, a newsmagazine style show that provides education about the latest topics, trends and issues in a variety of industries. The segment appeared on the World Business Review website, United Airlines in-flight news magazine, and on Bravo television. See What's New at [www.windstar.com](http://www.windstar.com) to view the video.

## WINDSTAR FEATURED ON NECN AND IN MASS HIGH TECH

At the last Mass Software Council annual meeting, Windstar Technologies was one of three members

companies chosen to present their story. As a result of that presentation, New England Cable News (NECN) and *Mass High Tech* did features on the company. Visit [www.windstar.com](http://www.windstar.com) to see a video clip from NECN and a reprint from *Mass High Tech*.

## WINDSTAR CREW COMINGS AND GOINGS

Don Buhan and Scott Liberman have joined Windstar as senior sales executives. Don will be working in higher education as well as the ERP interfaces and the hospital markets. Scott will be working in both the higher education and research institution markets. Martha Laster (formerly Mullen) joined the Windstar staff for the April and August Training Seminars. She will continue to offer her nonresident alien tax expertise in the development of policy and procedures for Windstar users. Beth Gamble is now responsible for our Marketing Operations. Chanda Green joined Windstar as Administrative Assistant.

Jason Foley has joined Windstar's Customer Support Team following graduation from Wentworth Institute of Technology. Jason worked at Windstar as an intern while at Wentworth. James Collins of IT Services is off to complete his degree at Northeastern. He will be back part-time. Angela Collins has joined the IT Services team following her recent graduation from ITT Technical Institute.

Rihong Cong joined Windstar as accounting assistant. She replaces Tracey Kelliher who will be completing her degree at University of Massachusetts Dartmouth. Megan Walter is also off to University of Miami after working for Windstar for the summer. Samantha Singer is back for 12 weeks while she takes a post-grad course at Northeastern. Megan and Sam both started working at Windstar while in high school.

Julie Titus has been promoted to Level 2 Technical Support. Pat Roth has taken over responsibility for Sales/Marketing Support. Steve Bonda earned his Microsoft Certified Professional Certification, including Certified Systems Administrator and Desktop/Support Technician. Bill French has been promoted to Quality Assurance.

And on a personal note . . .

*Paula and Gary Singer are the proud grandparents of twin girls, Grace and Rose.*

*Scott Liberman became a father for the first time with new son Sam.*

*Julie Delgrosso got married and is now Julie Titus.*

Congratulations to all!