



THE PLANTATION ON CRYSTAL RIVER
CONFERENCE LOCATION



2023-2024

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SPECIAL CRYSTAL RIVER NEWSLETTER
NOVEMBER 5-7, 2023
16 HOURS CPE
SPEAKER: TOM GORCZYNSKI, EA,
USTCP (Instructor)

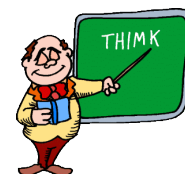
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SPEAKER: TOM GORCZYNSKI, EA, USTCP (Instructor)

ABOUT OUR SPEAKER



Thomas A. Gorczynski, EA, USTCP is a nationally recognized speaker and educator on federal tax law matters. He is the author of the Tom Talks Taxes newsletter, the co-author of the PassKey Learning Systems EA Review Series, and co-owner of Compass Tax Educators.

He is an Enrolled Agent, a Certified Tax Planner, a National Tax Practice Institute (TM) Fellow, a Certified Tax Resolution Specialist, and admitted to the bar of the United States Tax Court as a non-attorney.

Tom earned a Master of Science in Taxation from Golden Gate University and a Certificate in Finance and Accounting from the Wharton School at the University of Pennsylvania. He received the 2019 Excellence in Education Award from the National Association of Enrolled Agents and the 2018 Member of the Year Award from the American Institute of Certified Tax Planners.

Tom's tax practice in Phoenix, Arizona focuses on implementing advanced tax reduction strategies and representing taxpayers with complex tax problems before the IRS and the US Tax Court.

CONFERENCE TOPICS

S-CORPORATIONS: FROM START TO FINISH (6 CPE)

This comprehensive overview of S corporations discusses entity formation, S election requirements, operations, return preparation, stock basis, stock disposition, and tax planning opportunities. Learning objectives: Describe the tax consequences of forming an S corporation. Explain the steps required to make a timely or late S corporation election. Describe the tax consequences of S corp operations to both the corp and the shareholder. Determine the proper entries for an accurate S corporation return. Calculate a shareholder's basis in S corporation stock. Calculate the tax consequences of disposing of S. corporation stock.

STATUTES OF LIMITATIONS (2 CPE)

The Internal Revenue Code imposes time limits on both the IRS and taxpayers to take certain tax-related actions. This course will review in-depth the three main statutes of limitations—assessment, collection and refund—and use examples frequently encountered in practice to demonstrate key statute of limitations principles. Learning objectives: Describe the assessment statute of limitations and exceptions to the general rule. Describe the collection statute of limitations and exceptions to the general rule. Describe the refund statute of limitations and exceptions to the general rule. Understand how the statute of limitations can resolve a tax controversy.

NON-FILERS: HELPING TAXPAYERS GET INTO COMPLIANCE (2 CPE)

This course provides an overview of how to get a taxpayer into filing compliance when he or she has failed to file all required federal tax returns. In addition, participants will learn about the authority of the IRS to prepare substitute for return assessments and how those assessments impact non-filers. Learning objectives: Demonstrate how to outline a strategy for getting a non-filer into compliance. Explain IRS Policy Statement 5-133 and its effect on compliance. Describe common issues faced by non-filers, such as incomplete records. Understand the substitute for return process, especially as it relates to non-filers.

CONFERENCE TOPICS, continued

FEDERAL TAX UPDATE: INDIVIDUALS & BUSINESSES & THE CORPORATE TRANSPARENCY ACT (CTA) (4 CPE)

This course reviews key tax law changes and trends that impact the taxation of individuals and businesses in the past year. This will include an overview of The Corporate Transparency Act (CTA) which established federal information reporting requirements for certain types of corporations, limited liability companies, and other entities created in or registered to do business in the United States. Learning objectives: Describe how new tax legislation enacted by Congress impacts individual and business taxation. Explain how new IRS guidance and court cases impact individual and business taxation. Describe how existing tax law principles apply to new trends applicable to individuals and businesses.

SECTION 1031 EXCHANGES (2 CPE)

Real estate investors can use Section 1031 to defer gain on the sale or exchange of real property. This course will detail Section 1031 exchange mechanics and the tax results of using Section 1031 to the taxpayer. The use of Section 1031 in tax planning will also be discussed. Learning objectives: Describe how a real estate exchange qualifies for Section 1031 deferral. Calculate the tax results of a typical Section 1031 exchange to the taxpayer. Explain what constitutes real property for Section 1031 purposes.



PLANTATION ON CRYSTAL RIVER COURTYARD



**2023 FALL CONFERENCE
PLANTATION ON THE CRYSTAL RIVER
NOV 5—7 REGISTRATION FORM**

PLEASE PRINT CLEARLY. YOUR NAME MUST MATCH YOUR PTIN LISTING.

Name: _____

Professional Designation: EA _____ CPA _____ ATTY _____ Other (specify) _____

PTIN (required) _____ NATP Member # (required for discount) _____

Address: _____

City: _____ State _____ ZIP _____

EMAIL: (required) _____ Phone _____

Emergency Contact (not at the conference) Name _____

Phone # _____

REGISTRATION FEE: **\$350 Members** **\$400 Non-members** **Early Bird Deadline: Oct 10th**

\$400 Members **\$450 Non-Members** **Final Registration Deadline: Oct. 20th**

GOING GREEN: Your course materials and agenda will be sent to you by email in pdf format on **OCT 31.**

We accept: Visa, MC, AMEX and Discover cards. Make checks payable to Florida Chapter NATP.

Name as it appears on cc: _____

CC# _____ Exp Date: _____ Security Code _____

Signature: _____ ZIP Code: _____

Questions about the conference in general, please contact:

Laura Wood, EA—VP and Education Chair at laura@namsinc.net or 407--869-5766 or on our Chapter Facebook page, Florida Chapter, National Association of Tax Professionals

Questions regarding the registration only, contact Sandra Torrence, EA at 386-423-7771. or confidential1227@aol.com.

HOW TO REGISTER

Mail to: Florida Chapter NATP, Sandra Torrence, EA, P. O. Box 2280, New Smyrna Beach, FL. 32170

Fax: 386-423-3744 EMAIL: confidential1227@aol.com (not a secure site-call Sandra w/cc number.)

Cancellation Policy: To cancel your registration, notify Sandra Torrence, at confidential1227@aol.com no later than **OCT 30** to receive a refund. Cancellation fee is \$50. No refunds will be granted after that date unless due to extreme circumstances (Covid-19, family death, hospitalization, federally declared disaster area, for example) No-shows will not be granted refunds. Registration substitutions are accepted, provided payment for any difference in membership is paid.



2023 FALL CONFERENCE

AGENDA

SUNDAY & MONDAY

NOVEMBER 5 & 6

PLEASE DO NOT ARRIVE BEFORE REGISTRATION OPENS.

SUNDAY, NOV. 5

4 HOURS CPE

11:00—12:00PM	Registration (Light refreshments-box lunch)	
12:00— 1:40 PM	Statutes of Limitations	2 CPE
1:40—2:00 PM	Break (Light refreshments)	
2:00—3:40 PM	Section 1031 Exchanges	2 CPE

MONDAY, NOV. 6

8 HOURS CPE

8:00—9:00 AM	Registration, Continental Breakfast	
9:00—10:40 AM	S-Corporations: From start to finish	6 CPE
10:40—11:00 AM	Mid-morning Break (Light refreshments)	
11:00—12:40 PM	S-Corporations, continued	
12:40—1:40 PM	Lunch (provided)	
1:40—3:20 PM	S-Corporations, concluded	
3:20—3:40 PM	Afternoon Break (Light refreshments)	
3:40—5:20 PM	Non-Filers: Helping Taxpayers Get Into Compliance	2 CPE

2023 FALL CONFERENCE
AGENDA
TUESDAY NOVEMBER 7

PLEASE DO NOT ARRIVE BEFORE REGISTRATION OPENS

TUESDAY, NOV. 7

4 HOURS CPE

8:00—9:00 AM Registration (Refreshments)

(Last chance to buy raffle tickets)



9:00—10:40 AM Federal Tax Update: Individuals, Businesses &
the Corporate Transparency Act (CTA)

4 CPE

10:40—11:00 AM Mid-morning Break (Refreshments)

11:00—11:20 AM Scholarship Raffle

11:20—1:00 PM Federal Tax Update, concluded



THE PLANTATION ON CRYSTAL RIVER

BOOKING DETAILS



Group booking date ends Oct 12, 2023.

The hotel requests that all guests book online using the booking link below.

Click on "change dates" and enter your check in and check out dates. The available room choices will populate. Any questions or problems with booking, such as wanting to book dates before and after the conference dates that the online link may not show as available, please call the Hotel Reservations Department direct at 800-632-6262. Refer to booking name "National Association of Tax Professionals FL Chapter 2023". Please call Monday-Friday, 10 am to 6 pm and ask for Georgia Ann Jackson or Orlando Garcia. The group block of rooms will be held until the cutoff date of Thursday, October 12, 2023. Reservations received after this date will be on a rate and space available basis.

<https://www.choicehotels.com/reservations/groups/RQ19U6>

Resort details:

Check in is at 4 pm with check out at 11 am.

This is a 232 acre resort with restaurant, bar, tiki bar, pool, spa, boat launch and rentals, a driving range and putting green, kids playground and seasonal outdoor entertainment. .

Check out their website for more details and photographs.:
www.plantationoncrystalriver.com

Standard room rates (king or double) are \$119 plus a \$36 resort fee and taxes. The resort fee includes all guest services including wi-fi and parking.

Patio and water view room, add \$40.

JOHN & BIBI RUDESTEDT
CHAPTER GROWTH SCHOLARSHIP

Qualifications for the Scholarship

- The scholarship award is a free Registration specifically for a Florida NATP conference. We will award three (3) scholarships.
- Membership in NATP is not required. An applicant, however, must never have attended a Florida NATP conference.
- All applicants must have a valid PTIN number.
- Application deadline for the upcoming conference is **THURSDAY, OCT. 5TH**.
- Registration winners will be drawn on OCT. 6TH . The winners will be notified via e-mail and in an at-large Chapter email.
- To enter: E-mail your completed application to: Doris Dimon, Scholarship Committee Chair at doris.dimon@gmail.com or mail it to her at Harbor Bookkeeping & Tax Preparation, Inc., 2807 Wesleyan Dr., Palm Harbor, FL 34684.

APPLICATION

Name: _____

NATP Member: _____ Yes _____ No PTIN: _____

Address: _____

City, _____ State _____, Zip: _____

Phone: _____ Fax: _____

E-mail: _____

Please tell us about yourself, including the number of years in the tax profession and any credentials. _____

Explain why you feel you should be chosen for the Scholarship:

CONFERENCE RAFFLE

FUNDING THE NEXT SCHOLARSHIP

Excitement abounds during our Gigantic, Fun and often Surprising raffle. The raffle funds our Scholarship program. Raffle tickets will be sold for \$5 each or 3 tickets for \$10 up until the last minute. So save up your nickels and dimes —we always have a good time with this event raffling off lots of interesting and valuable items.

Raffle items may be donated by conference attendees. They are welcomed and very much appreciated. Use your imagination to create unique and interesting items which will encourage ticket sales and support our Scholarship program.

Due to prior funding, we are able to support three Scholarships this year.

CONFERENCE MATERIALS: PDF files will be sent to your email address on October 31, 2023.

REMINDERS: The usual cautions apply about wearing layered clothing due to varying room temperatures. No smoking, use of e-cigarettes or use of recording devices is permitted in the classroom.





SAVE THE DATE
UPCOMING EVENTS

2024

DAYTONA WORKSHOP
JANUARY 5, 2024
LOCATION DETAILS TBA

ANNUAL SPRING 3-DAY CONFERENCE
DAYTONA BEACH SHORES RESORT & SPA
MAY 5—7, 2024

SEMINAR AT SEA
RCCL WONDER OF THE SEAS
NOV 10-17, 2024
BOOK NOW—DETAILS ON OUR
WEBSITE: WWW.FLNATP.COM

2025

DAYTONA WORKSHOP
JANUARY 3, 2025
LOCATION DETAILS TBA

Our Facebook Page—Are You a Member?

Our Facebook Page is a valuable tool for two-way information exchange and getting to know other members. The more members we have participating, the better the page will be. Feel free to post tax questions, tax practice, tax tips, tax news, humorous tax-related stories, and the like. We welcome your participation, but please remember that this is a TAX page. There are plenty of other pages that will provide political and other news, so please keep it tax-related. Also, this is not a place to advertise your business. Help wanted or seeking employment posts are acceptable.

Find us on Facebook at Florida Chapter, National Association Of Tax Professionals. We are now up to **600** members. But more than numbers, this is becoming an active page for questions and information. Thanks to all our members, new and old, who are contributing to the discussion on this page. Of our 600 members most are active, so I would encourage those of you who are not, to become involved and if you're not a member, join the group.

QUICKFINDER & THE TAX BOOK DISCOUNTS

ORDER NOW

QUICKFINDER—A new faster and easier way to order your discounted Quickfinder products. Simply visit tax.tr.com/NATP and select the Quickfinder products in the quantity and format you'd like, add them to your cart and checkout with your credit card. Your association discount, sales tax and shipping fees are all calculated automatically! You can also call 800-510-8997 and use discount code Q680.

THE TAX BOOK—Please use our Group Promo Code available on our website when ordering your Tax Book(s). The Chapter receives \$5 for each copy of The Tax Book you order and \$10 for each Web Library purchased. Discounts depend on products ordered and quantity. Order online at: thetaxbook.com/order or by phone at 866-919-5277.