



SUNSHINE STATE REPORTER

YOUR FLORIDA CHAPTER NEWSLETTER

FEBRUARY 1, 2022

2021-2022 BOARD OF DIRECTORS

AMY HAMILTON, EA
President

LAURA WOOD, EA
Vice President
Education Chair

DORIS DIMON, EA
Secretary
Scholarship Committee Chair

SANDRA TORRENCE, EA
Treasurer
Newsletter Editor

KENNETH DOWDALL, EA
Director
Nominations Committee Chair

JOHN STANCIL, CPA
Director
Facebook Editor

JUDY WHITE, EA
Director

MARK MILLER, CPA
Director

MIKE REPOLI, CPA, EA
Director

May 15-17 CONFERENCE

16 CPE

The Shores Resort & Spa **Daytona Beach Shores**

- ♦ Thomas Gorczynski, EA, USTCP will be our speaker.
- ♦ Three registration Scholarships to give away. Apply by April 15.
- ♦ Three Board members to elect

INDEX

<u>ITEM</u>	<u>PAGE</u>
May Conference Speaker	2
May Conference Topics	3
May Conference Hotel Info	4
May Conference Registration Form	5
May Conference Agenda	6-7
Board elections	8
Scholarship Application (3 to award)	9
Feedback, Facebook and reference pubs	10
Conference Raffle, Materials, Reminders	11



ABOUT OUR SPEAKER

THOMAS A. GORCZYNSKI, EA, USTCP

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

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 in the United States Tax Court. Learn more about Tom and his upcoming educational offerings at www.gorczynski.tax.



Our Chapter is very fortunate to have Thomas as our speaker for our smaller and more intimate Annual Conference as he usually speaks at much larger national events. As those of you who were on our 2019 cruise will remember, Thomas was a tremendous speaker whose classes were extremely enlightening, well-received and provided attendees with effective course materials.

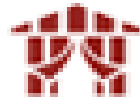
Your Board realizes that our May conference fees are higher than in 2021, however based on the upper level fees he typically warrants we are fortunate to bring Thomas to you at a rate which is in line with our 2019 and 2020 prices.

TOPICS



- | | |
|---|-------|
| 1. MASTERING TAX RESEARCH &
CREATING A WINNING TAX
ARGUMENT | 3 CPE |
| 2. IRS TAX POSITION DISCLOSURES
AND FORM 8275 | 1 CPE |
| 3. 1099 REPORTING, COMPLIANCE &
RECONCILING | 2 CPE |
| 4. CIRCULAR 230 ETHICS: PRICING
ENGAGEMENTS | 2 CPE |
| 5. ENTITY CLASSIFICATION: RULES
AND ELECTIONS | 2 CPE |
| 6. TAX IMPLICATIONS OF MAJOR
LIFE EVENTS | 2 CPE |
| 7. CRYPTOCURRENCY TAXATION | 2 CPE |
| 8. PENALTY ABATEMENT STRATEGIES | 2 CPE |

TOTAL: 16 CPE



The Shores RESORT & SPA

Our beachfront conference host hotel is located at 2637 S. Atlantic Ave, Daytona Beach Shores 32118. Phone: 386-767-7350

For reservations, phone 866-934-7467 or visit their web site at: www.ShoresResort.com. Advise that you are with the Florida NATP conference group. Special group room rates will be available to book until **April 21**. (Book Now!!) From May 12th through 20th group rates are: Run of Hotel, \$135; Ocean Front king balcony rooms are \$165. Add on state taxes at 12.5% plus a \$10.65 (incl. tax) resort fee per night.

The resort fee provides wireless internet in rooms and most public areas, two complementary bottles of water, use of fitness center, daily newspaper, DVD library, local and toll-free phone calls, and a complimentary S'mores kit to use at the outdoor fire pit.

PARKING: Overnight self-parking is complimentary; valet parking for overnight guests is \$24.50 (incl. tax). For guests attending the meeting only, the valet parking is \$5 (incl. tax). Just inform the valet attendant that you're there for the meeting only. Self parking is located directly across A1A from the hotel. There is a walkover bridge to the hotel. Gates should be open; if not the valet attendant has the code.

REGISTRATION FORM

**2022 ANNUAL SPRING CONFERENCE
SUNDAY MAY 15—TUESDAY MAY 17
DAYTONA BEACH SHORES, FLORIDA**



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 NAME & PHONE—required (contact who is not at the conference with you)

REGISTRATION FEE: \$350 Members \$400 Non-members After Friday, April 22, add \$50

Final Registration Acceptance is Friday, May 6.

GOING GREEN: Your course materials and agenda will be sent to you by email in pdf format on **Mon. 5/9.**

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: _____

Questions about the hotel or the conference in general, please contact:

Laura Wood, EA—VP and Education Chair at laura@namsinc.net or on our Chapter Facebook page.

Questions regarding the registration only, contact Sandra Torrence, EA at 386-423-7771.

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 **Monday, 5/9** to receive a refund. Cancellation fee is \$50. No refunds will be granted after **May 9** 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.



2022 ANNUAL SPRING CONFERENCE AGENDA MAY 15—17

PLEASE DO NOT ARRIVE BEFORE REGISTRATION OPENS.

SUNDAY, MAY 15 - 4 HOURS CPE

11:00—12:00PM	Registration (Light refreshments)	
12:00— 1:40 PM	Mastering Tax Research & Creating A Winning Tax Argument	3 CPE
1:40—--2:00 PM	Break (Light refreshments)	
2:00—2:50 PM	Mastering Tax Research, continued	
2:50—3:00 PM	Short “stretch” break	
3:00—3:50 PM	IRS Tax Position Disclosures and Form 8275	1 CPE

MONDAY, MAY 16 -- 8 HOURS CPE

8:00—9:00 AM	Registration, Continental Breakfast	
9:00—10:40 AM	1099 Reporting, Compliance & Reconciling	2 CPE
10:40—11:00 AM	Mid-morning Break (Light refreshments)	
11:00—12:40 PM	Circular 230 Ethics: Pricing Engagements	2 CPE
12:40--2:00 PM	Lunch (provided)	
2:00—3:40 PM	Entity Classification: Rules & Elections	2 CPE
3:40—4:00 PM	Afternoon Break (Light refreshments)	
4:00—5:40 PM	Tax Implications of Major Life Events	2 CPE



2022 ANNUAL SPRING CONFERENCE AGENDA MAY 15—17

PLEASE DO NOT ARRIVE BEFORE REGISTRATION OPENS

TUESDAY, MAY 17 - 4 HOURS CPE

8:00—9:00 AM	Registration (Refreshments)	
9:00—10:40 AM	Cryptocurrency Taxation	2 CPE
10:40—11:00 AM	Mid-morning Break (Refreshments)	
11:00—11:20 AM	Scholarship Raffle	
11:20—1:00 PM	Penalty Abatement Strategies	2 CPE

Masks may be required unless seated in the conference room or eating lunch.



FLORIDA CHAPTER BOARD
BECOME A MEMBER

By Ken Dowdall, Nominations Chairman

Can you spare me 55 seconds before the paper avalanche arrives?

It is that time of year. No—not tax season. Florida's NATP Board elections will occur in May. But, you say, it's tax season, I don't have time to put together a campaign. Sorry, wrong excuse/answer. We don't allow any campaigning. No dirty tricks either. Just let us know you are interested, send us a paragraph about yourself or resume and you are on the ballot. No fuss, no muss.

As a Board we hold three to five zoom meetings a year and meet in person twice a year at our spring and fall educational events. (You should be going to those anyway as they are the best value for in person education around—and the instructors will answer your pernickety questions even if they are off topic for the scheduled classes.) You can be involved in making sure that we offer our members the best low cost educational opportunities to hone their skills and meet their CPE requirements.

The compensation package remains the same—there isn't one, but Board members are reimbursed for lodging and travel expenses.

Contact Ken at: dowdalltax@gmail.com



THREE
AWARDS

JOHN & BIBI RUDESTEDT
CHAPTER GROWTH SCHOLARSHIP

Qualifications for the Scholarship

- The scholarship award is a free Registration specifically for a Florida NATP conference.
- 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 **FRIDAY, APRIL 15**
- Registration winners will be drawn on APRIL 16TH.. 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:

FEEDBACK, FACEBOOK, QUICKFINDER & THE TAXBOOK

We Want Your Feedback

This is your newsletter and we would like to meet your wants and needs. Our primary objective is to inform members about happenings in the Chapter, but we like to include other information. If you have any suggestions for what to include in the newsletter or other changes, let us know. E-mail me, Sandra Torrence, at confidential1227@aol.com. We don't promise to implement every idea you send us, but we do promise to evaluate each submission.



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 448 members. On the way to 500. 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 448 members 275 are active, so I would encourage the rest of you to get active and if you're not a member, join the group.

We also have a webpage where you can read our newsletter and obtain other information about the Chapter. www.flnatp.com. We are exploring moving into additional social media platforms.

And don't forget the NATP National website. www.natptax.com where you can find out what's happening on the national level.

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.



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. (You may also make a cash donation to the Fund itself which can be tax deductible. You will be provided with a receipt.)

CONFERENCE MATERIALS: PDF files will be sent to your email address on **MONDAY, MAY 9th.**

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.

