

# **SUNSHINE STATE REPORTER**

## **YOUR FLORIDA CHAPTER NEWSLETTER**

### **JUNE 2023**



**2023-2024**

**BOARD OF DIRECTORS**

**AMY BROSNAN, EA**

**PRESIDENT**

**LAURA WOOD, EA**

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**JUDY WHITE, EA**

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**SOCIAL EVENTS CHAIR**

**NANCY ANDERSON, EA**

**DIRECTOR**

**MARK MILLER, CPA**

**DIRECTOR**

**JEREMY WELLS, EA, CPA**

**DIRECTOR**

**THE CRUISE NEWSLETTER**

**NOV. 10-17, 2024**

**SEMINARS AT SEA**

**ABOARD RCCL'S WONDER OF THE SEAS**

**CLASSES ON 11/11 & 11/12**

**SPEAKER: KATHRYN KEANE, EA**

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CONFERENCE SPEAKER, KATHY MORGAN, EA, USTCP



Amy Brosnan, Chapter President, presenting John Stancil, CPA, Chapter Director and Facebook editor, with a gift from the Board upon his retirement.



There were 83 attendees at our Annual Spring conference.





## THE 2023-2024 FLORIDA NATP BOARD

Front row: Amy Brosnan, President, Doris Dimon, Secretary, Sandra Torrence, Treasurer  
 Back row: Laura Wood, VP, Nancy Anderson, Director, Jeremy Wells, Director, Judy White, Director, Mark Miller, Director. (not shown, Ken Dowdall, Director).



### NEWLY ELECTED BOARD MEMBERS:

NANCY ANDERSON, EA

LAURA WOOD, EA VP & EDUCATION CHAIR

JEREMY WELLS, EA, CPA



**NANCY ANDERSON, EA, was elected to the Board of Directors to serve a three year term. She replaces Mike Repoli, who retired.**

**Nancy is an EA and Quickbooks ProAdvisor, with over 30 years experience in accounting services, as well as 17 years with corporate and individual taxation. She has her own business called Nancy Anderson Accounting Service.**

**Nancy attended Liberty University, where she graduated with a Bachelor of Science in Accounting in 1998. She continued for a fifth year at USF with courses in Accounting and Taxes. In 2006 she became an Enrolled Agent.**

**Nancy has been a member of NATP since September 2012. In her free time she likes boating, kayaking, paddle boarding, hiking and riding horses.**





JEREMY WELLS, EA CPA, was elected to the Board of Directors to serve a three year term. He replaces John Stancil, CPA, who retired.

Jeremy runs JWells, CFO, a tax and accounting firm specializing in helping independent knowledge workers run smart businesses. He became an enrolled agent in 2018 and a Florida CPA in 2022. He is a member of the American Institute of Certified Public Accountants, the National Association of Enrolled Agents (NAEA) and since 2019 has been a member of NATP. He serves on the editorial board of NAEA's *The EA Journal*. He co-hosts the CPA Advisory Show, a podcast encouraging accountants to be more helpful.

Jeremy lives in Saint Augustine with his wife and their daughter.



POOLSIDE AT THE SHORES RESORT AND SPA.

LAURA WAS UP EARLY AND TOOK THIS SUNRISE PHOTO.





SCHOLARSHIP RAFFLE TABLE AND ANNOUNCING THE RAFFLE WINNERS.





The Board and family, having fun at a local eatery, *The Garlic*.

From the front—Doris Dimon, Secretary, Russell King, Colorado Chapter President, Judy White, Director and Entertainment Chair, new Board Director, Nancy Anderson, Mrs. John Stancil, John Stancil retiring Director.

The Board enjoyed dinner at *Fysh Restaurant* following the annual Board meeting. From left around the table: Mike Repoli (retiring), Mrs. John Stancil, John Stancil, (retiring), Judy White, Director, Kathy Morgan (speaker), Amy Brosnan, President, Mark Miller, Director, Laura Wood, VP, Sandra Torrence, Treasurer, Doris Dimon, Secretary, Owen Oatley, Past President.





## MIX & MINGLE PARTYGOERS





MIX & MINGLE PARTY TIME. ARE YOU HERE?





LOOKS LIKE THE PARTY WAS A SUCCESS!

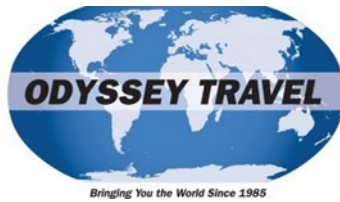




**OUR SPEAKER—  
KATHRYN KEANE, EA**



**KATHRYN KEANE, EA, NTPI FELLOW** is the principal tax professional at Macanta Corporation, a small family owned tax and related services practice located in Brooklyn, NY, serving over 1,015 individual clients and 86 businesses, along with many non-profits. Kathryn served two three-year terms on the National Board of Directors of NATP. Kathryn is the first ever three time winner of NATP's Chapter Person of the Year for 2014, 2008 and for 2002 recognizing her volunteer service to the community at large as well as to NATP. In addition to serving on the Board and Education Committee of the NY Chapter of NATP, she currently serves as Chair of the IRS Tri-boro Practitioner Liaison Committee. Kathryn is a frequent speaker at many NATP Chapter events. She has presented at VASEA as well as Brooklyn/Queens Chapter of NYSSEA. Kathryn currently serves the Ladies Ancient Order of Hibernians as the officer in her Division and County. Kathryn is a member of the National Society of Accountants, National Association of Enrolled Agents, as well as the Better Business Bureau of NYC. Kathryn has a B.S. degree from Brooklyn College.



## **FL NATP SEMINARS AT SEA**

**RCCL WONDER OF THE SEAS**

**NOVEMBER 10-17, 2024**

### **CRUISE REGISTRATION FORM**

Complete both pages and return to: [NATP@odysseytravel.com](mailto:NATP@odysseytravel.com)

This is a verified secure email site.

Odyssey Travel Advisor: Jeanne Huth (386) 672-8113

#### **Guest #1**

**NAME (As shown on passport)** \_\_\_\_\_

Name You go by \_\_\_\_\_ Birthdate \_\_\_\_/\_\_\_\_/\_\_\_\_

Mailing Address \_\_\_\_\_ City \_\_\_\_\_ Zip Code \_\_\_\_\_

Email Address \_\_\_\_\_ Cell Phone \_\_\_\_\_

Crown & Anchor Number (if applicable) \_\_\_\_\_

Emergency Contact Name \_\_\_\_\_ Phone Number \_\_\_\_\_

Traveler's Passport Number \_\_\_\_\_ Country \_\_\_\_\_ Expiration Date \_\_\_\_\_

#### **Guest #2**

**NAME (As shown on passport)** \_\_\_\_\_

Name You go by \_\_\_\_\_ Birthdate \_\_\_\_/\_\_\_\_/\_\_\_\_

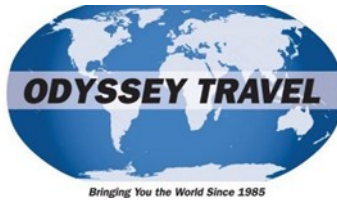
Mailing Address \_\_\_\_\_ City \_\_\_\_\_ ZipCode \_\_\_\_\_

Email Address \_\_\_\_\_ Cell Phone \_\_\_\_\_

Crown & Anchor Number (if applicable) \_\_\_\_\_

Emergency Contact Name \_\_\_\_\_ Phone Number \_\_\_\_\_

Traveler's Passport Number \_\_\_\_\_ Country \_\_\_\_\_ Expiration Date \_\_\_\_\_



**WONDER OF THE SEAS 11/10 –17, 2024**

**FL NATP GROUP PRICING** (as available)

**Inside Stateroom:** \$1,046.64 per person (based on double occupancy) Cabin total: 2,093.28

**Ocean View :** \$1,223.64 per person (based on double occupancy) Cabin total: 2,447.28

**Balcony Stateroom:** \$1,641.64 per person (based on double occupancy) Cabin total: 3,283.28  
(20 Cabins available at this price, book now).

**Balcony Stateroom:** \$1,797.64 per person (based on double occupancy) Cabin total: 3,595.28

RCCL price increase since initial group booking date. No difference in balcony cabins.

37 cabins available

**BED TYPE:** \_\_\_\_\_ Queen or \_\_\_\_\_ 2 Twins

**DINING:** \_\_\_\_\_ Early (5:15 PM) \_\_\_\_\_ Late (7:45 PM) \_\_\_\_\_ MY TIME (5:30-9:30 PM)

**Pre Paid Gratuities:** \$112.00 Per Person \_\_\_\_\_

**Optional Cancellation Insurance:** \$149.00 Per Person \_\_\_\_\_

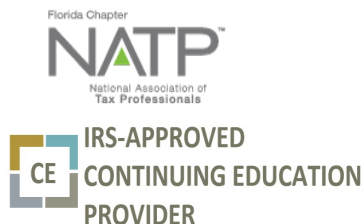
**\*\*At the time of booking a \$250.00 per person deposit is required to secure the cabin and cabin assignment.**



CC Number : \_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_ Exp. : \_\_\_\_\_ SEC : \_\_\_\_\_

Name on the Card: \_\_\_\_\_

Billing Address : \_\_\_\_\_



**2024 SEMINAR REGISTRATION FORM**  
**ABOARD WONDER OF THE SEAS**  
**TUESDAY & WEDNESDAY NOV. 11 & 12**  
**JADE & SAPPHIRE CLASSROOMS**

**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 \_\_\_\_\_

**REGISTRATION FEE:**      \$ 375 Members    \$425 Cabin not booked with Odyssey Travel

**Final Registration Acceptance is JULY 29, 2024** (Last Cabin Payment Date)

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

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](mailto: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](mailto: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](mailto:confidential1227@aol.com) no later than **Friday 10/25** 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.



## 2024 SEMINAR AT SEA

### AGENDA

**MONDAY 11/11**

**JADE & SAPPHIRE ROOMS**

**DECK 3**

***PLEASE DO NOT ARRIVE BEFORE REGISTRATION OPENS.***

**MONDAY, NOVEMBER 11**

**6 HOURS CPE**

9:00—10:00 AM	Registration—Coffee, pastry, yogurt parfait
10:00—11:40 AM	Topic TBA
11:40—12:00 AM	Mid-morning Break — Coffee refresh
12:00—1:40 PM	Topic TBA
1:40--2:40 PM	Lunch — On your own
2:40— 4:20 PM	Topic TBA

**5:00 PM MEET AND GREET COCKTAIL PARTY WITH CANAPES**

*SHIPBOARD LOCATION TBA*



## 2024 SEMINAR AT SEA

### AGENDA

**TUESDAY 11/12**

**JADE & SAPPHIRE ROOMS**

**DECK 3**

***PLEASE DO NOT ARRIVE BEFORE REGISTRATION OPENS.***

**TUESDAY NOVEMBER 12**

**6 HOURS CPE**

9:00—10:00 AM	Registration—Coffee, pastry, yogurt parfait
10:00—11:40 AM	Topic TBA
11:40—12:00 AM	Mid-morning Break — Coffee refresh
12:00—1:40 PM	Topic TBA
1:40—2:40 PM	Lunch — On your own
2:40— 4:20 PM	Topic TBA

## CRUISE NOTES

### SPECIAL EVENT—MEET & GREET

6 PM to 7 PM Monday, 11/11/24—Cocktail party.

Open bar with house and call brand liquors, wine by the glass, beer, soda, juices and mixers. No frozen beverages. Light canapes. Shipboard location TBA.

Website: [royalcaribbean.com/cruise-ships/wonder-of-the-seas](https://royalcaribbean.com/cruise-ships/wonder-of-the-seas)



Saturday, 11/16: PERFECT DAY AT COCO CAY, BAHAMAS

## ROYAL CARIBBEAN CRUISE LINE

### WONDER OF THE SEAS



### SHIP STATISTICS

*WONDER OF THE SEAS* is the flagship of Royal Caribbean International. She was completed in 2002 and is an Oasis class cruise ship. She is the largest cruise ship in the world by gross tonnage. (Icon is coming.) She has 18 decks and accommodates 5,734 passengers and 2,300 crew. There are 20 restaurants and four pools.

### ITINERARY

DAY ONE:	SUNDAY 11/10	DEPART PORT CANAVERAL
DAY TWO:	MONDAY 11/11	AT SEA/ 6 HRS CLASSES
DAY THREE:	TUESDAY 11/12	AT SEA/ 6 HRS CLASSES
DAY FOUR:	WEDNESDAY 11/13	PHILIPSBURG, ST. MAARTEN
DAY FIVE:	THURSDAY 11/14	CHARLOTTE AMALIE, ST THOMAS
DAY SIX:	FRIDAY 11/15	AT SEA
DAY SEVEN:	SATURDAY 11/16	PERFECT DAY AT COCO CAY

THE CONFERENCE AGENDA AND TOPIC DESCRIPTIONS WILL BE PRESENTED IN  
A FUTURE NEWSLETTER.

PICTURE  
YOURSELF  
RELAXING ON  
YOUR CABIN  
BALCONY .....



.....OR BASKING  
IN THE SUN BY  
ONE OF THE  
FOUR POOLS.



BUT, AFTER ALL THE FUN  
(AND EDUCATION), IT'S TIME  
TO SAY GOOD BYE.



**SAVE THE DATE**  
**UPCOMING EVENTS**

**2023**

**FALL 3-DAY CONFERENCE**  
**THE PLANTATION INN, CRYSTAL RIVER**  
**NOVEMBER 5—7, 2023**

**2024**

**DAYTONA ONE DAY WORKSHOP**  
**JANUARY 5, 2024**  
**LOCATION DETAILS TBA**

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



## **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](http://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.

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