

SUNSHINE STATE REPORTER

YOUR FLORIDA CHAPTER NEWSLETTER

MAY 2020

2019-20 BOARD OF DIRECTORS

AMY BROSNAN, EA
President

LAURA WOOD, EA
Vice President
Education Chair

DORIS DIMON, EA
Secretary

SANDRA TORRENCE, EA
Treasurer

KENNETH DOWDALL, EA
Director
Nominations Committee Chair

STEVEN HAMILTON II, EA
Director

JOHN STANCIL, CPA
Director
Newsletter Editor

JUDY WHITE, EA
Director

MARK MILLER, CPA
Director

***Spring being a tough act to
follow, God created June.***
—Al Bernstein

Save the Date!

Our annual spring conference has been rescheduled
for Thursday and Friday November 12-13, 2020 at

The Shores Resort and Spa

Daytona Beach Shores FL

Great Education, Board Elections and Fun!

Information about Board Elections and a chance to
win a scholarship is included in this newsletter.

INDEX

The President's Perspective	2
Changes	3
Dimon Elected Secretary	4
Board Elections	5 - 6
Win a Scholarship	7 - 8
New Facebook Contest	9
Tax Book and Quickfinder Discounts	10

The President's Perspective

Well, 2020 has not been anything like we have expected. We would have already had our Annual Conference and spent some time on the Beach in Daytona. However, here we are, still working on tax returns, PPP loans and forgiveness, EIDL Loans, the Stimulus and new guidance from the IRS almost daily. I've heard from a lot of members that they are feeling extreme burnout and trust me when I tell you that you are not alone. Please make sure you are setting boundaries appropriately with your clients. No is a complete sentence. Your health is more important than anything else.

I'm reading a book called *Your Face Mask First*. I started it before masks were required, trendy, or part of our everyday lives. It is a reference to putting your oxygen mask on first before helping people when flying on plane. It's a hard concept for me and probably many of us since we are in a customer service industry. You must put yourself first to help others. I would guess that we have been stretched out of our comfort zone the last few months and it has affected our families as well as ourselves. I never thought I would homeschool a child. I'm not sure I am smarter than a first grader at this point. We are all experiencing some type of reaction to this time in history.

Please take time for yourselves. Take a weekend off and sleep in or take a walk. I found I was struggling with limited contact to people and it was becoming a struggle daily. I joined a Zoom call of some other accountants and wow! It was so great to talk to others. I didn't feel alone, and the socializing was a huge boost to me. Consider getting on a Zoom call with some friends or use Facebook Messenger to call friends. It's a huge thing for your mental health to surround yourself with people that can encourage and understand you. It will be an immediate boost. Find what will help you focus on positive and uplifting things. Change your perspective. It will be the best thing for you.

The State is slowly starting to open, and it is just so exciting. Please take care of yourselves and make good choices. In the next few weeks and months, the Chapter will be rolling out some webinars to help with non-federal topics – like cybersecurity and how to run a virtual tax practice. We are working on the details right now. I think COVID-19 has brought to light some things we might need to work on in our practices and we can always learn and improve.

At this point, at the IRS: PPS (Practitioner Priority Service Line) is open but expect long waits. E-service is open. The normal IRS phone line, the one for people to call about their stimulus checks, just re-opened. CAF is still not open for faxes, but they are trying to catch up. I hope it will open soon. I have a nice stack to fax. Some mail centers have opened, but they will be so far behind that it will take a long while to catch up. I think we will have to be patient so its hurry up and wait. This will be hard for many of our clients since they want things handled now, but our hands are tied.

Please make sure you join our Facebook page and check it often. We are always posting tidbits and important information there. If you aren't a member, look us up at Florida Chapter, National Association of Tax Professionals. We would love to have you join us!

Hang In there!

Amy E. Brosnan, EA

Ch Ch Ch Changes

This is, by and large, a repeat of the article that appeared in the May issue. But it is still relevant so we thought we would include it again since we are still making plans and don't have the answers yet. All plans at this point are, of necessity, tentative. More detail may be found on some of these topics elsewhere in the newsletter.

1. **Annual Spring Conference.** Originally scheduled for May, 2020, we had to postpone this meeting. It has been rescheduled for November 12-13, 2020 at the same location, The Shores Resort and Spa in Daytona Beach Shores. Room rates will be the same. The rate will be honored three days prior and three days after the meeting. We do not yet have a code to obtain the reduced room rate. Randy Lawshe remains as our speaker. We are re-evaluating the topics as the massive changes in tax law may dictate that we include some new material so the seminars will be of optimal interest and value to our members. As the details are finalized, that information will be made available in the newsletter, on our web page, and our chapter Facebook Page.
2. **Board Elections.** We are planning to elect three Board Members at the Annual Meeting. Information and an application can be found elsewhere in this newsletter.
3. **Scholarship.** Our plans are to continue to offer The John & Bibi Rudestadt Chapter Growth Scholarship covering the registration fee to an individual who has never attended a Florida NATP education event. The deadline for application is September 30. An application and additional information are in the newsletter.
4. **Networking Groups.** These are suspended indefinitely. Although the Board has not addressed this issue, we obviously cannot hold these meetings at the current time, due to legal restrictions and closed restaurants. Once the economy opens up, we will evaluate resuming these meetings.



Doris Dimon Elected Chapter Secretary



At a recent Board Meeting, the Directors unanimously chose Doris Dimon to serve as Chapter Secretary following the resignation of Steven Hamilton, II from that position.

Doris is an Enrolled Agent living in Palm Harbor. She has owned and operated Harbor Bookkeeping and Tax Preparation, Inc. since 2006. She has served on the Florida NATP Board since November, 2013.

She is originally from Long Island, NY. Her two sons still live there, along with her five grandchildren.



Upcoming Board Elections

At the November Annual Meeting, members present will elect three members to the Board of Directors. The Board is responsible for planning educational and other events for the chapter.

Chapter members who are at least 18 years of age and in good standing are eligible to be nominated as Director Candidates. The period for recommendations to the Nomination Committee shall close 45 days before the election, and the report of the Nomination Committee's nominees shall be sent to each Member in good standing at least 15 days before the election.

Currently, there are nine members of the Board, with three being elected each year to a three-year term. The Board holds several meetings each year, either in person or via teleconference. If you would like additional information about board membership, feel free to contact any member of the Board.

If you wish to be considered for board membership, you must submit an application which is included on the following page. If you are not ready to serve on the board, you might consider serving on a committee. Committee membership is by appointment by the Board. If you are interested in serving in this capacity contact the President or any Board member for more information. Member participation is vital to maintaining an ongoing quality state chapter.





Application to participate in the Florida Chapter
As a Board Member - an elected office
Or as a Committee member - election not required

Name: _____

Address: _____

Email address _____ Phone number _____

I have been a member of NATP for _____ years. Membership # _____

I am a: CPA ___ EA ___ Tax Practitioner ___ Other (describe) _____

I have been a tax/accounting professional for _____ years. My PTIN is _____

Name of firm or practice _____

Address _____

I am interested in serving on the Florida Board: Yes _____ No _____.

Or I am interested in serving on a Florida committee:

Education ___ Membership ___ Nominations ___ Other _____.

Comments or additional information _____

Please attach a list of your involvement and or attendance at NATP events, local or national, over the last three years. A resume would also be appreciated.

Signature: _____ Date _____

Please mail your application to: Kenneth D. Dowdall, EA
5433 NW 88th Terr
Coral Springs FL 33067-2854
Or fax to 954 941-1160



Several years ago, the Florida Chapter established the John & Bibi Rudestedt Chapter Growth Scholarship Fund to honor long time NATP members John and Bibi Rudestedt. With an eye toward growth in the chapter, this scholarship is awarded annually to someone who has never attended a Florida NATP Conference.

You do not have to be a member of the Florida NATP Chapter to apply for the scholarship. The Scholarship covers only the registration fee for a Florida NATP conference.

In order to apply, complete the application on the following page. The deadline for application has been extended to September 30, 2020. You must have a valid PTIN number. If you have any questions, contact Doris Dimon at doris.dimon@gmail.com

At the annual spring conference we hold a raffle to raise funds for this scholarship. Consider bringing something for our raffle. Gift cards and merchandise are welcome.

***Win A Free Registration
To an NATP
Chapter Conference***

JOHN & BIBI RUDESTEDT
CHAPTER GROWTH SCHOLARSHIP FUND

Qualifications for the Scholarship

- The scholarship award is a free registration only 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 **September 30**.
- Winner will be drawn at random from the submitted applications on **October 1**. The winner 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.

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:

Win! Win! Win!

Again! Again! Again!

Join Our Facebook Page

As most of you know, last month we ran a promotion to get new members on our Facebook Page . At that time we had 197 members. As of this writing we are up to 234 members. The winner of last month's gift card was Heather Cargile Bush. Congratulations to her and thank you to all our members new and old. But we aren't satisfied. We are now shooting for **272** members on our page. This number represents 20% of our Florida Chapter membership. You do not have to be a NATP member to join.

When we reach that goal, one member will win a copy of the ***Peace of Mind Planner***. You can use this planner to give you and your loved ones peace of mind! Enter vital details about your contacts, legal matters, health, financial affairs, instructions, and more in this guided planner, and keep it in a secure location. This information can be invaluable to your relatives if they need to know about your contacts and other such information.

Just to keep things honest, Board members are prohibited from winning. A procedure will be set up to assure that all members (other than the Board) will have an equal chance of winning. It doesn't matter how long you've been a member of our page, you have a chance to win. Please note that you are not a member until you answer the three qualifying questions and are approved by an administrator. Also, Heather is ineligible as she won the previous contest.

Just look for Florida Chapter, National Association Of Tax Professionals on Facebook. Please join us on that page and participate in the discussions. Feel free to ask tax questions, questions about Chapter events, or other tax-related matters. Also, we use this page to inform members of events or tax tips that they may find beneficial.



QUICKFINDER & THE TAX BOOK

DISCOUNTS

ORDER NOW

More information, including order blanks can be found on our web page. www.flnatp.com. Click on "Special Offers."

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.

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.

