



SUNSHINE STATE REPORTER
YOUR FLORIDA CHAPTER NEWSLETTER
MARCH 2023

2022-2023

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2023 SPRING CONFERENCE

16 HOURS CPE

MAY 14-16

THE SHORES RESORT AND SPA

DAYTONA BEACH SHORES

SPEAKER: KATHY MORGAN, EA, USTCP

FINAL REGISTRATION: MAY 5TH

REGISTER NOW

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OUR CONFERENCE SPEAKER

KATHY MORGAN, EA, USTCP

KATHY MORGAN BIOGRAPHY

Kathy retired in 2018 after 25 years with H&R Block and started her own practice, *Puzzled By Taxes, LLC*. She has been a tax CPE instructor for National and State level organizations, including NATP, NAEA, Tax Practice Pro and Webce.com, around the country for the last ten years.

Her prior careers as a USAF military police officer and as a police communications officer for the Bossier City Police give her a wide variety of experience that translate into tax issues. She proudly holds the titles of Enrolled Agent and United States Tax Court Practitioner.

She has been published by several tax research companies, including Parker Tax Publishing, The EA journal, NATP Tax Journal and Tax-Connections.com. She is an accomplished speaker and instructor on a wide variety of tax issues and teaches both live and via webinar.

Kathy lives and practices in the Shreveport, Louisiana area and when not "talking tax" she enjoys spending time with her grandchildren and family, writing and reading.



CONFERENCE TOPICS

SPRING 2023



The Smart Attorney's Best Friend: The Tax Professional (2 hrs)

The things that attorneys deal with that need the assistance of a tax professional. Overview of taxes in those situations and a short bit on how to get the attorneys to "let you" help them.

Working From Home—This Will Be A Snap, Right? (2 hrs)

The pros and cons of a home-based business and a big section on home office.

Conflicts Of Interest: Getting Caught In The Middle (2 hrs)

A look at the various types of conflicts of interest tax professionals can be involved in and how to solve the issues. Participants will learn the types of conflicts they need to be aware of; how to determine if the conflict is able to be waived and how to waive the conflict. This will include conflicts in preparation work and representation work.

Substantiation: Records + Receipts = Deductions (1 hr)

Overview of IRS requirements for substantiation and tips and techniques for getting the client to keep the necessary records.

The Taxpayer Advocate: What They Can and Cannot Do (1 hr)

When, why and how to use the IRS Taxpayer Advocate office for your clients.

Due Diligence: It's Not Just For EITC Anymore (2 hrs) Ethics

A detailed dive into due diligence from the tax professionals' side of the desk including items needing due diligence with case studies and preparer penalties and preparer audits.

Continued on page 5



CONFERENCE TOPICS CONCLUDED

Residential Rentals: Money Pit Or Hidden Gem (2 hrs)

A run down of putting a residential rental into service. The way things carry to the tax return and how to handle depreciation, disposition and limitations.

Discharging Taxes In Bankruptcy And Your Other Resolution Options (2 hrs)

A dive into bankruptcy and how it effects taxes and other resolution options. Includes case studies on timelines for including taxes in bankruptcy.

Net Operating Loss: Harvesting Refunds For Your Clients (2 hrs)

Starts with a primer on NOL's and the way they operate up through the TCJA rules. Then, how NOL's interact with CARES and also NOL interaction with other topics under CARES like EBL, PAL, depreciation changes, etc.



REGISTRATION FORM
2023 SPRING CONFERENCE
SUNDAY MAY 14—TUESDAY MAY 16

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, APR 21 add \$50**

Final Registration Acceptance is Friday, May 5

GOING GREEN: Your course materials and agenda will be sent to you by email in pdf format on **Tues. 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 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 **Monday, 5/8** to receive a refund. Cancellation fee is \$50. No refunds will be granted after **May 8** 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 SPRING CONFERENCE

AGENDA

MAY 14 and 15th

PLEASE DO NOT ARRIVE BEFORE REGISTRATION OPENS.

SUNDAY, May 14 5 HOURS CPE

11:00—12:00PM	Registration (Light refreshments)	
12:00— 1:40 PM	The Smart Attorney's Best Friend: The Tax Professional	2 CPE
1:40---2:00 PM	Break (Light refreshments)	
2:00---3:40 PM	Working From Home. This Will Be A Snap, Right?	2 CPE
3:40---4:30 PM	Substantiation: Records+Receipts=Deductions	1 CPE

MONDAY, May 15 7 HOURS CPE

8:00---9:00 AM	Registration, Continental Breakfast	
9:00---10:40 AM	Conflicts Of Interest: Getting Caught In The Middle	2 CPE
10:40---11:00 AM	Mid-morning Break (Light refreshments)	
11:00---12:40 PM	Residential Rentals: Money Pit or Hidden Gem	2 CPE
12:40---1:40 PM	Lunch (provided)	
1:40---3:20 PM	Due Diligence: It's Not Just For EITC Anymore (Ethics)	2 CPE
3:20---3:40 PM	Afternoon Break (Light refreshments)	
3:40---4:30 PM	Taxpayer Advocate: What They Can and Cannot Do	1 CPE

2023 SPRING CONFERENCE

AGENDA

TUESDAY, MAY 16

PLEASE DO NOT ARRIVE BEFORE REGISTRATION OPENS

TUESDAY, May 16

4 HOURS CPE

8:00—9:00 AM	Registration (Refreshments)	
9:00—10:40 AM	Discharging Taxes In Bankruptcy and Your Other Resolution Options	2 CPE
10:40—11:00 AM	Mid-morning Break (Refreshments)	
11:00—11:20 AM	Scholarship Raffle	
11:20—1:00 PM	Net Operating Losses: Harvesting Refunds For Your Clients	2 CPE

Masks are optional.



Our **beachfront** conference host hotel is located at 2637 S. Atlantic Ave, Daytona Beach Shores 32118.

For reservations: On the website, www.ShoresResort.com, use code: 2305NATION. Or call: 386-767-7350. Reference the "Florida NATP" event. A direct link is below.

Special group room rates will be available to book until **April 21**. (Book Now!!) From May 12th through 16th group rates are: Run of Hotel, \$142. Ocean Front king balcony rooms \$172. Add on state taxes are 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, two welcome Shores cocktails, morning beach yoga, use of the fitness center, and a complimentary S'mores kit to use at the outdoor fire pit and more.

PARKING: Overnight self-parking is \$5 plus 6.5% tax. Valet parking for overnight guests is \$25 (plus tax). 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.

<https://be.synxis.com/?Hotel=17713&Chain=5433&arrive=2023-05-12&depart=2023-05-17&adult=1&child=0&group=2305NATION>

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 14th**
- Registration winners will be drawn on Saturday April 15th. 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:

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. 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. We do have minimum requirements to become a Board member: You must have a valid PTIN, be a current NATP member and have an active e-mail address.

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 do not pay registration fees and are reimbursed for lodging and travel expenses.

Contact Ken at: dowdalltax@gmail.com



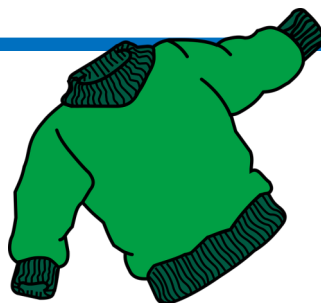
CONFERENCE RAFFLE

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 Tuesday, 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.



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 **571** members. On the way to 600. 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 553 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.

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.