



# **SUNSHINE STATE REPORTER**

## **YOUR FLORIDA CHAPTER NEWSLETTER**

### **OCTOBER 5, 2021**

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#### **NOV 7-9 CONFERENCE**

#### **REGISTRATION**

#### **EARLY BIRD DEADLINE: OCT 7TH**

- ♦ West coast venue: The Plantation On Crystal River
- ♦ Speaker: Beanna Whitlock, EA
- ♦ 16 Hours of CE over three days
- ♦ Three registration Scholarships to give away

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# FL- NATP Announcing our Nov 7 – 9 Fall Conference, at *The Plantation on Crystal River*



Earn 16 CPE while taking a well  
deserved get-a-way following end of tax season!!

The Florida Chapter is excited to offer this new venue which offers so many amenities beyond our conference, you will want to come for the CPE, but will want to stay longer to enjoy all that is offered at this amazing Resort !

*More info to follow on our Speaker & Classes.*

Room rates are \$109. for a standard double or king room, \$139. for Waterview standard double or king. A \$20. resort fee added includes nearly all amenities at resort plus free parking for vehicles & boat trailers.

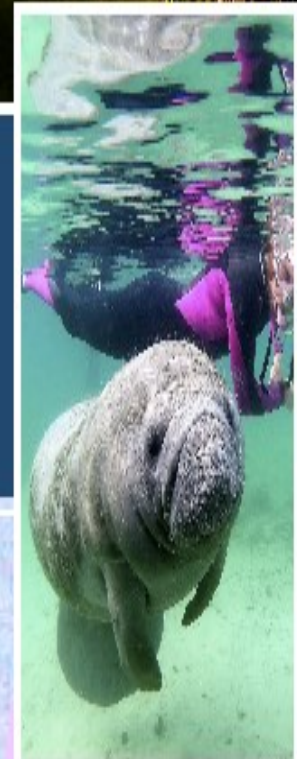
If you call to book your reservation please ask for the “N.A.T.P—FL Chapter rates”

Watch this 4 minute video link previewing the Resort :

<https://youtu.be/QQhXoHNf9Go>

Basic reservation link, but do call for any additional days or special requests, renovated rooms, 800-632-6262:

<https://www.choicehotels.com/reservations/groups/FF65X6>



# FL- NATP Announcing our Nov 7 – 9 Fall Conference, at *The Plantation on Crystal River*



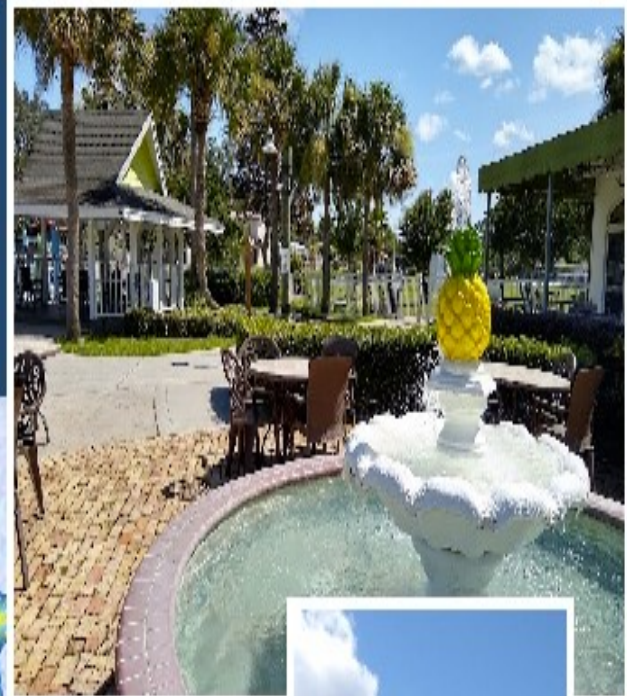
Here is a brief outline of our class

Times, Resort Amenities & local activities...

Our class format was created to allow some free time to enjoy the Resort, starting class on Sunday afternoon, Monday will start approx. 9 am—4:30, Tuesday 9 am—12 noon. *A detailed schedule will be sent out.*

You will want to come for the CPE, but will want to stay longer to enjoy all that is offered at this resort. Sitting on over 230 acres, with direct water access and a full service Adventure Center on Kings Bay where you can:

- rent various boats or a Captain to take you out
- kayaks & paddleboards and so much more
- a 27 hole golf course, the 9 hole Executive course included with resort fee & unlimited range balls
- a fabulous pool & Tiki bar
- billiards, card tables & game room
- free boat/ jet ski trailer parking onsite
- Full service Day Spa, ready to pamper you!
- fishing, biking or hiking + Crescent Beach is just a short ride past the resort
- The local area offers numerous restaurants, a local quaint Downtown for shopping and so much more!
- Our special rates are offered for 3 days before & after conference days, so plan your get-a-way now.





***FALL CONFERENCE SPEAKER  
BEANNA J. WHITLOCK, EA***

## **ABOUT OUR SPEAKER**

### **BEANNA J. WHITLOCK, EA**

Beanna is an Enrolled Agent in private practice as Whitlock Tax Service, LLC located in Canyon Lake, TX.

A tax law instructor for more than 40 years with an emphasis on Limited Liability Companies and Ethics and Professional Conduct presentations. Beanna has taught tax professionals across the country and is an adjunct professor for Auburn University. She is a faculty member of the National Center for Professional Education as well as the Executive Director of the ncpefellowship, a web based organization providing educational resources and practice management tools for tax professionals at [www.ncpefellowship.com](http://www.ncpefellowship.com).

She has testified before Congress, Treasury and the IRS Oversight Board. She has served on the IRS Information Reporting Program Advisory Council as well as the IRS Commissioner's Advisory Group (CAG). She served as the IRS Director of National Public Liaison for Commissioner Mark Everson and is a recipient of the Commissioner's Award for Excellence of Service.

She has been honored by *Accounting Today* as one of the 100 Most Influential in Accounting for an unprecedented seven years.

Known for her fierce defense of the tax professional community, Beanna is frequently consulted by accounting and tax publications regarding issues concerning the tax professional community.

She is the 2013 Member of the Year of the California Society of Tax Consultants.

Honored by the National Conference of CPA Practitioners in 2015 for her contribution to Excellence in Education, "Beanna serves the tax professional community as an inspired calling".

She is joined in the practice of Whitlock Tax Service, LLC, offering taxpayer representation and tax return preparation, by her husband of 52 years, Tom Whitlock.

They enjoy antiquing, travel and time at home with their three dachshunds, CoCo, DeeDee and Buddy, the blonde doxie!

**REGISTRATION FORM**  
**2021 FALL CONFERENCE**  
**SUNDAY NOV 7—TUESDAY NOV 9**  
**CRYSTAL RIVER, FLORIDA**



**PLEASE PRINT CLEARLY.**

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:**      **Early bird by Oct 7: \$250 Members \$275 Non-members**

**After Oct 7:                      \$275 Members \$300 Non-members**

**Final Registration Acceptance is Monday Oct 25.**

*Check Seating Preference*  
*Socially Distant*  
*Normal Conference Room*

**GOING GREEN:** Your course materials will be sent to you by email in pdf format on **Friday Oct 29**

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 Chairperson at [laura@namsinc.net](mailto: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](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 **WED Oct 27** to receive a refund. Cancellation fee is \$50. No refunds will be granted after **Oct 27** 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.



## 2021 FALL CONFERENCE

### AGENDA

**NOV. 7—9**

#### **SUNDAY, NOV 7 - 4 HOURS CPE**

11:00—12:00PM	Registration (Light refreshments)	
12:00— 1:40 PM	The Vocabulary of Ethics	2 CPE
1:40—2:00 PM	Break (Light refreshments)	
2:00—3:40 PM	Notice Season	2 CPE

#### **MONDAY, NOV 8 -- 8 HOURS CPE**

7:00—8:00 AM	Registration, Continental Breakfast	
8:00—9:40 AM	Limited Liability Companies	4 CPE
9:40—10:00 AM	Mid-morning Break (Light refreshments)	
10:00—1:40 AM	Limited Liability Companies, continued	
11:40—1:00 PM	Lunch (provided)	
1:00 --2:40 PM	1031 Exchanges	2 CPE
2:40—3:00 PM	Afternoon Break (Light refreshments)	
3:00—4:40 PM	Tax Law Changes	2 CPE

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



## 2021 FALL CONFERENCE

### AGENDA

**NOV. 7—9**

#### **TUESDAY, NOV. 9 - 4 HOURS CPE**

8:00—9:00 AM	Registration ( Refreshments )	
9:00—10:40 AM	Offers In Compromise	2 CPE
10:40—11:00 AM	Mid-morning Break (Refreshments)	
11:00—11:20 AM	Scholarship Raffle	
11:20—1:00 PM	Questions of the Month	2 CPE

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



## TOPIC DESCRIPTIONS



### THE VOCABULARY OF ETHICS (2 Hours)

"If you are going to walk the walk, talk the talk."

Presentation introduces Tax Professionals to the vocabulary or words that should be familiar to them as they practice the business of tax. As Tax Professionals we have learned how to dress, furnish our offices and even what we require of staff to give the image of ethical behavior. It takes more from us than an image. We, in the business of tax, must know and understand "walking the walk and talking the talk".

The course includes application of Circular 230, Federal Code of Regulations governing Tax Professionals. Examples will demonstrate use of words and their meanings to enhance our conduct, solidify our understanding of the meaning of ethical behavior and give us tools providing a firm foundation for our actions.

#### *Learning Objectives:*

1. Participant will understand what it means to be ethical, in thought, word and deed.
2. Participant will discover the power of Circular 230 and the requirement that Tax Professionals behave ethically.
3. Participants will find confidence in knowing that their decisions have ethical foundations.

## **TOPIC DESCRIPTIONS** (continued from page 9)

### **The Notice Season:** (2 Hours)

Just as Elvis never got to leave the building, Tax Professionals never have time off. As soon as the Tax Filing Season ends, the Notice Season begins. As certainly one of the most prolific seasons for IRS Notices, the Tax Professional must know, understand and be able to assist their taxpayers during times when the phone rings at the IRS but no one is home. Tax Professionals will learn about the most frequent notices issued by the IRS and how to successfully handle situations for their clients in a concise and productive manner. Tax Professionals will understand the most critical notices they may receive and how they can avert a penalty that comes at a substantial price.

### **Limited Liability Companies** (4 Hours)

The presentation is a Tax Professional's guidebook on all things LLC. From what they are to what they are not and how to identify taxpayers who can use the LLC to accomplish their needs, wishes and desires. Fundamentally, Tax Professionals will understand the difference between Federal Tax Classifications available to the LLC: which are defaults and which are elections. Tax Professionals with general knowledge of LLC law will be brought up to date with practical application of techniques used to secure limited liability for LLC members through business procedures and application. Instructional tools to help the Tax Professional convey the importance of LLC management will be provided. Issues of foreign members of LLCs and special tax treatment when the LLC is owner of rental property as well as when members of LLCs sell their interest will be discussed. Multiple LLCs vs. a "series" LLC will be discussed with light shed on how to effectively have one LLC with multiple businesses or rental properties. Tax Professionals will enhance their knowledge of this fast-growing form of business formation and how to maximize it's benefits. Question time will be available.

## TOPIC DESCRIPTIONS (continued from page 10)

### IRC 1031 EXCHANGES (2 Hours)

The Tax Cuts and Jobs Act of 2018 greatly changed the "landscape" of Code Section 1031 Exchanges, allowing only real estate to be considered for like/kind property. Tax Professionals must know what property qualifies for a 1031 Exchange as well as the procedures by which the IRS allows such deferral of gain. Time constraints, a reverse exchange, how to assist your taxpayer to determine basis in newly acquired property will be discussed. Restrictions for not only individual taxpayers but for business taxpayers as well are outlined with examples.

### REVIEW OF TAX LAW CHANGES YOU MIGHT HAVE MISSED (2 Hours)

Not only was 2020 a year of COVID tax law changes, the changes continued well into 2021. Time spent in review of the CARES Act, the SECURE Act, the Reconciliation Acts as well as the Relief to American Families Act will enable Tax Professionals to determine if returns filed should be amended; if the IRS acted properly to issue additional refunds and how to file returns for 2021. Tools and reminders will inspire Tax Professionals to be aware of the needs of their clients in light of recent Congressional changes and IRS Regulations.





## TOPIC DESCRIPTIONS (Continued from page 11)

### THE NEW OFFER IN COMPROMISE (2 Hours)

Tax Professionals will find that COVID-19 tax issues will result in IRS demanding payment of taxes for income such as distributions from retirement plans and sales of assets. The funds were likely used to support their families and are no longer available to pay the IRS. Many taxpayers laid off due to COVID-19 are no longer able to find work and as the economy tightens, may never find work. It is incumbent upon Tax Professionals to know the rights of the taxpayer when it comes to compromising their taxes before the Commissioner of the IRS. Tax Professionals will learn the tools available to them, how to quickly determine OIC candidates and the plan of action to have an Offer in Compromise accepted. Tax Professionals will learn how to charge for their services and most importantly how to keep their taxpayers compliant.

### QUESTIONS OF THE MONTH (2 Hours)

From the archives of the ncpeFellowship, Beanna will present questions from Tax Professionals from across the United States, discuss best answers and get thoughts from Tax Professionals in attendance. Knowledge is one half of tax preparation and the other half is experience. The session, intended to engage the Tax Professional, will allow all to learn, experience through participating and acquire keen pieces of information to help their clients. If time permits, questions from the audience will be entertained.



## **THREE** **AWARDS**

### JOHN & BIBI RUDESTEDT CHAPTER GROWTH SCHOLARSHIP FUND- 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, OCT 22**
- Registration winners will be drawn on OCT. 23rd.. 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](mailto: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. \_\_\_\_\_

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

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## 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](mailto: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](http://www.flnatp.com). We are exploring moving into additional social media platforms.

And don't forget the NATP National website. [www.natptax.com](http://www.natptax.com) where you can find out what's happening on the national level.

### QUICKFINDER & THE TAX BOOK DISCOUNTS

#### ORDER NOW

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**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](http://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 Friday, October 29.

**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.

