

SUNSHINE STATE REPORTER

YOUR FLORIDA CHAPTER NEWSLETTER

SEPTEMBER 21, 2021



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PRESENTING

OUR NOVEMBER CONFERENCE

NOV. 7-9

- ♦ West coast venue: The Plantation at Crystal River
- ♦ Beanna Whitlock, EA, CSA is our speaker
- ♦ 16 Hours of CE over three days
- ♦ Three registration Scholarships to give away
- ♦ Note: Topics and Agenda TBA

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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.

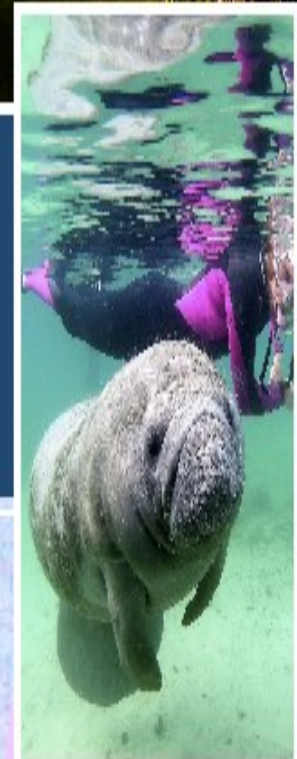
If you call to book your reservation please ask for the “N.A.T.P—FL Chapter rates”

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>



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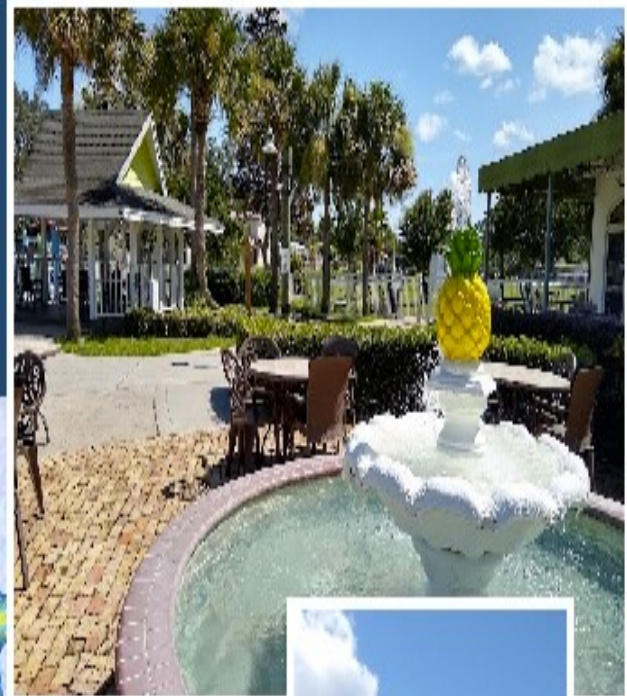
Here is a brief outline of our class

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, CSA***

ABOUT OUR SPEAKER

BEANNA J. WHITLOCK, EA, CSA

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.

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 or on our Chapter Facebook page.

Questions regarding the registration only, contact Sandra Torrence, EA (see below)

HOW TO REGISTER

Mail to: Florida Chapter NATP, Sandra Torrence, EA, P. O. Box 2280, New Smyrna Beach, FL. 32170

Phone: 386-423-7771 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 **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.



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 winner will be drawn on OCT. 23rd.. 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.

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 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.

