



ARIZONA CHAPTER - NATP
2018 TAX UPDATE

FRIDAY
December 7, 2018

Join us for up to 8 hours of Federal CPE and 1 hour of AZ current issues and grow your tax knowledge.

Embassy Suites Tempe
4400 S Rural Rd
Tempe, AZ 85282
480-897-7444



Registration Fee	Member: \$149	Nonmember: \$174
After Nov. 21, 2018	Member: \$174	Nonmember: \$199
E-Material Only	\$50	

Register online at www.natptax.com/Chapters/Pages/ArizonaChapterEducation.aspx

Registrations must be received at NATP by close of business December 6, 2018

After that date, please register at the door

Bring a seminar participant who is not a member of NATP and earn \$25 in AZ-Bucks! Earn \$25 more if they join!

Please bring new, unwrapped toys to support our chapter charity, Arizona's Children Association

AZ-NATP ~ AN NATP AWARD WINNING CHAPTER

EARN UP TO 8 CPE CREDITS*

AGENDA & SPEAKERS (subject to change)

~~SCHEDULE & TOPICS~~

Friday, December 7, 2018

Instructor

7:00 AM	Sign-In	Register For Seminar & Continental Breakfast	
7:30 AM	Seminar:	Ethics - Ethical dilemmas, and the requirements of Circular 230 in those situations	Sharon Lewis, EA
9:25 AM	Seminar:	Arizona Tax Update - Update and review of 2018	Arizona Department of Revenue
10:15 AM	Seminar:	2018 Federal Tax Update and Review	Lisa Novack, IRS Liaison
11:55 AM		Lunch Time! On-site lunch provided	
12:55 PM	Seminar:	Old Lady Who Lived in a Shoe - how the TCJA interacts with filing status, dependency and credits	Lin Leclair, EA
2:50 PM	Seminar:	Section 199A Qualified Business Income (QBI)- includes calculations, basis and phase outs	Andrew Mark, CPA
4:30 PM		Wrap Up - Drawing for AZ Bonus Bucks	

Please visit www.aznatp.org for additional information

*Disclaimer: Eight hours of Continuing Professional Education will be issued to Enrolled Agents.

Lawyers, CPAs and other professionals are responsible for reporting their CPE credits in accordance with the requirements of their regulating or certifying organizations. They may obtain more or less CPE credit depending on those requirements.

Topics, speakers and order of presentations are subject to change.

~~SPEAKERS~~

Sharon Lewis, EA



Sharon owned her first business at the age of 14 doing odd jobs in the community of her grandparent's summer house. She always had an interest in business and began college with the intent of studying business administration. Then by chance, one of her professors pointed her in the direction of accounting. Sharon spent 10 years working in banking and mortgage loan operations. After the last bank she worked for sold to another bank, she decided that she wanted something a little more stable and that she could call her own. She started LBS as a bookkeeping firm while continuing her knowledge base in taxation. Sharon became an Enrolled Agent giving her the same authority before the IRS as CPAs and Attorneys. Sharon is now certified to teach classes in return preparation. Sharon is also a CPA candidate.

Lisa Novack, IRS

Lisa is a Senior Stakeholder Liaison with the Southwest Area of Stakeholder Liaison - Field Operations, a function of the Small Business and Self-Employed Division of the Internal Revenue Service. As a Liaison, she works with practitioner and small business organizations to provide members with information about the policies, practices and procedures the IRS uses to ensure compliance with the tax laws. She has been with the IRS since 1987, starting out as a tax auditor before getting into education and outreach. She has a Bachelor of Arts degree in Criminal Justice from Indiana University.



Lin Leclair, EA



Lin majored in Accounting at the University of Maine. She has been working in the tax business for 27 years and has been an Enrolled Agent since June 1995. Lin has successfully represented multiple clients in IRS audits. She is a frequent presenter for the National Association of Enrolled Agents and the National Association of Tax Professionals. Lin is currently the President of the Arizona Chapter of National Association of Tax Professionals. Lin resides in Tucson where she is a founding partner and President of 1st Choice Tax Services, Inc.

Andrew Mark, CPA

Andrew has been a CPA since 1993 and has a B.S. degree in Finance from Arizona State University. A second generation CPA, Andrew started his CPA firm in 2002 and completes over 400 individual and small business returns annually. He also offers Quickbooks support, tax consulting and IRS representation to clients. He has been a member of NATP for 10 years and an Arizona chapter board member since December 2008. During his time as a board member, Andrew has tracked legislative changes proposed and enacted in Arizona and has served in most of the Board positions. Andrew is also a member of the Arizona Society of CPAs and serves as volunteer Treasurer of a Scottsdale Pet Therapy Group that brings dogs to nursing homes.

