

Arizona NATP Fall State Tax Review

MEMBERS ONLY EVENT

Please Join your Arizona Chapter for a Great Arizona State Tax Review.

Due to the current sanitary restrictions we are offering our education virtually to protect your health and ours. Do not miss the opportunity to receive education about Arizona Tax Topics by Katherine A Gudgel, EA, PHD a native instructor from Arizona eager to help every Arizonan save money on their state return.

**Katherine A. Gudgel, EA,
 PHD**



As an Enrolled Agent (EA), Katie specializes in helping seniors and trusts. Early on, Katie found that many taxpayers have difficulties collecting all the documents needed to prepare their tax returns. Katie grew up in Tempe, AZ and went to the University of Arizona where she received a B.S. in Physics and M.S. and Ph.D. in Materials Science and Engineering. When she moved to Germany in 2001, Katie worked as a scientist, but soon became interested in the business side of product development and how to help businesses become more profitable. In Chicagoland, she earned a degree in accounting and qualified to take the CPA exam. While in school, Katie gained practical experience preparing taxes by volunteering with Ladder Up's VITA program. She also developed a passion for helping individuals better understand money.

Class Description

Many tax preparers receive training on federal tax law – but don't ever receive training specific to Arizona tax returns, and are instead either self-taught (reading AZ DOR publications or the AZ Revised Statutes) or learn on the fly when clients mention something. This webinar will help you stay ahead of the game, by identifying many of the differences between the Federal 1040 and the AZ 140 and their associated forms as it relates to income (i.e. investments, retirement), deductions and credits (i.e. medical expenses, charitable donations, Family Income Tax Credit), and general tax requirements (i.e. due dates, dependents). By properly preparing an AZ income tax return, preparers can save their clients hundreds of dollars.

Class Objectives

- Develop a list of questions to ask your AZ clients
- Recognize some of the key income and deduction limits related to AZ income tax returns
- Differentiate between Federal and AZ taxation with regards to different types of income, deductions, and credits
- Verify whether your tax software needs a special "code" to properly transfer information from the federal data entry to the AZ tax return

Provide advice to clients how they may be able to reduce their AZ tax liabilities both during the tax year and even after the tax year has ended

AGENDA



- 10:00 am – 10:50 am AZ State Tax Review
- 10:50 am – 11:10 am Annual Meeting
- 11:10 am – 12:00 noon AZ State Tax Review
- 12:00 noon – 1:00 pm Q & A



REGISTRATION

Please register by **October 26, 2020**.
 The Cost is **\$20.00** for 2 AZ CPE credits, and a session of Q&A by your local experts!

Register here:

This is a Members Only Event; the Annual Meeting and 2021 Board Election will be taking place within the event.