



FRIDAY DECEMBER 9, 2022

Tucson, Arizona

AZ NATP 2022 Tax Update

Join us for up to 2 hours of Ethics, 6 hours of Federal CE/CPE* and 1 hour of Arizona Education

Course Descriptions

BINGO! I've got Ethics: Definitely not your typical boring Ethics class. Sure, you need 2 hours every year, but why not have fun at the same time. Join us to fill that Bingo card with your knowledge through the ethical journey of our tax profession. This does not qualify for Ethics Credit for CPAs.

2022 Arizona Tax Update: Update and review of 2022 Arizona Tax Topics. We will go over 2022 legislative changes but also how 2022 court cases will impact previously passed legislation.

Working with Taxpayer Advocate Service: Representatives from the Taxpayer Advocate Service will discuss how they can help tax practitioners and taxpayers.

2022 IRS Federal Tax Update: Get the latest updates directly from the IRS and review new tax law and legislation.

Principle Residence Taxation Issues: A good percentage of our clients own their homes, and for good reason! The government has been more than generous with home ownership tax goodies. And some very interesting tax situations arise around home ownership: deductions, credits, the \$121 exclusion, home office, conversion of a principal residence to a rental and conversion of a rental for a principal residence, and – last but far from least – foreclosures. This presentation will examine such situations and provide examples of the applicable tax treatments.

1041 Trust Tax Returns after TCJA: An overview for accurately preparing 1041 tax returns for a Trust after the Tax Cuts and Jobs Act was enacted in 2017. The course includes definitions necessary to accurately determine the trust reporting requirements, changes mandated by the TCJA, the most important elections that can be made to affect the outcome of the trust as well as two case study examples showcasing differences in trust reporting during the initial and final years of a Trust life cycle.

***Disclaimer:** Eight hours of Continuing Education (incl. two hours of Ethics) will be issued to Enrolled Agents. Lawyers, CPAs and other professionals are responsible for reporting the 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.

Venue

Viscount Hotel

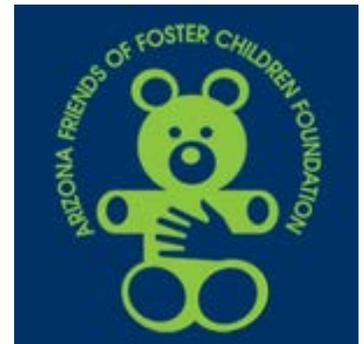


4855 E Broadway
Tucson, AZ 85711

Reservations: 520-745-6500

Chapter Charity Support

We will be hosting a 50/50 raffle to benefit our Chapter Charity the Arizona Friends of Foster Children Foundation.



Speakers

Lin Leclair, EA

Katherine Gudgel, PhD, EA

Melissa Chapman, Taxpayer Advocate

Lisa Novack, IRS Liaison

Amy Wall, EA, MBA

George Harris, EA

Got Ethics?

Do you know that if you have your ethics credit requirements for the year you do not have to take the class again!

AZ NATP 2022 Tax Update

Schedule

7:00 am to 7:30 am	Registration
7:30 am to 9:10 am	Ethics: Bingo Lin Leclair, EA
9:10 am to 9:20 am	Break
9:20 am to 10:10 am	2022 AZ Tax Update Katherine Gudge, EA
10:10 am to 10:25 am	Break
10:25 am to 11:15 pm	Working with Taxpayer Advocate Service Melissa Chapman
11:20 to 12:10pm	2022 Federal Tax Update Lisa Novack
12:10 pm to 1:10 pm	Lunch
1:10 pm to 2:50 pm	Principal Residence Amy Wall, EA, MBA
2:50 pm to 3:00 pm	Break
3:00 pm to 4:40 pm	1041 Trust Tax Returns after TCJA George Harris, EA
4:40pm	Wrap Up – Drawing AZ Bucks and 50/50 Raffle

Registration Fee

	<u>NATP Member</u>	<u>Non-Member</u>
Early: By Nov 18, 2022	\$199	\$229
After Nov 18, 2022	\$229	\$259
E-Material Only		\$100

Register online at:

www.natptax.com/Chapters/Pages/ArizonaChapterEducation.aspx

For more information visit: www.aznatp.com

Registrations must be received at NATP by close of business Dec 5, 2022. After this date, please register at the event. Registration is refundable (less \$50 cancellation fee) if requested by Nov 28, 2022. Bring a seminar participant who is not a member of NATP and earn \$25 in AZ-Bucks! Earn \$25 more if they join!

Why you should attend AZ NATP's 2022 Tax Update!

- Timely topics presented by knowledgeable tax professionals, including
 - Ethics with Lin Leclair is never boring
 - Arizona Updates by Katie Gudge presenting topics relevant to your tax practice
 - IRS speakers who want to help tax practitioners
 - Principle residence issues presented by Amy Wall are particularly relevant in dynamic housing markets
 - Introduction to Trusts presented by George Harris will enable you to help your clients now and in the future whether you are new to trusts or not
- Materials available in both printed and electronic formats
- Choice of two different dates / locations
- Networking with fellow local tax professionals
- Bonus!!! Ability to meet on-site with local representatives from the Taxpayer Advocate Service

Representatives from the Taxpayer Advocate Service will be ON-SITE

Do you have clients who need a little more help? Do you need guidance on what to do next?

30-minute appointments with case managers from the AZ Taxpayer Advocate Service will be available on a first-come, first-serve basis. Make sure to bring your SIGNED Power of Attorney documents (as they will not be able to verify your authorization through CAF)

~~Arizona NATP is an Award Winning Chapter~~



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Visit our page: www.aznatp.com

Our Speakers for AZ NATP 2022 Tax Updates



Lin Leclair, EA

Lin majored in Accounting at the University of Maine and became an Enrolled Agent in June 1995. She 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 past-President and current Treasurer of the Arizona

Chapter of the National Association of Tax Professionals. Lin is the founding partner and President of 1st Choice Tax Services, Inc. She and her husband Dan along with their children and grandchildren reside in Tucson.

Katherine Gudge, PhD, EA

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. While going back to school studying accounting, 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 management and teaching fellow tax preparers.



Melissa Chapman, Taxpayer Advocate

Melissa Chapman is the current Local Taxpayer Advocate for the Phoenix, AZ office of the Taxpayer Advocate Service. Prior to her career with the IRS, Melissa was a Licensed Residential Real Estate Appraiser and Licensed Real Estate Agent in Southeast Missouri.

Over her 14 year career with the IRS, Melissa has helped individuals, businesses, Powers of Attorney and Congressional Aides with every tax issue imaginable.

Lisa Novack, IRS Stakeholder Liaison

Lisa Novack is a Senior Stakeholder Liaison with Communication and Liaison Outreach Division of the Internal Revenue Service. As a Liaison, she works with practitioner, small business organizations and community-based organizations to provide information they can share 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.



Amy Wall, EA, MBA

Amy M. Wall, EA, MBA, is recently retired from her private tax practice in Tucson, Arizona, where she worked with individuals, small businesses and S Corporations. Amy now spends her time teaching and writing on taxation. She teaches for several continuing education providers and has been published in a number of tax journals, including NATP's *Tax*

Pro Journal and *Wolters Kluwer Journal of Tax Practice & Procedure*. She is the author of *Virtual Tax: the taxation of Cryptocurrency*; *Income Taxes for Real Estate Agents*; *Divorce and Taxes*; and *The Parish*, a work of fiction about a tax preparer whose nighttime clients aren't quite what they seem.

George Harris, EA

George Harris has been a co-owner of 1st Choice Tax Services in Tucson since 2010. Prior to that, he was a Master Tax Advisor with H&R Block's Premium Tax Office for 12 years; preparing tax returns, managing office operations and instructing advanced level tax courses. He has been an Enrolled Agent since 2005 and holds a Bachelor of Science degree from Purdue University in Computer Science. He is a member of the National Association of Tax Professionals and the National Association of Enrolled Agents.

