Arizona Chapter NATP National Association of Tax Professionals

ARIZONA NATP

2023 ANNUAL CONFERENCE AND MEETING

August 16-18, 2023
Wednesday - Friday

Join us for up to 18 hours of continuing education* on current issues and to expand your tax knowledge

DoubleTree by Hilton Phoenix Mesa
1011 West Holmes Avenue
Mesa, AZ 85210

Reserve Your Room by July 16, 2023 for
Room Rate of $109.00 plus tax
Available nights of 8/15 to 8/18
Group Name: Arizona Chapter National Association of Tax Professionals
Group Code: TAX

Click here to make your discounted room reservation or call 480-833-5555
https://www.hilton.com/en/attend-my-event/meswhdt-tax-b43d6c21-ff7d-44ea-a3d8-82dc66cb1a26/

Registration Fee	***$499***
After Aug 2, 2023	***$549***
E-Material Only	***$100***

Register online at:

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

Registrations must be received at NATP by close of business Aug 14, 2023
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!

AZ-NATP – AN AWARD-WINNING CHAPTER

Wednesday evening: Appetizers and Bonus Session

Continental Breakfast and Lunch are provided both Thursday and Friday

~~ SPEAKERS~~

Jaye E Tritz, EA, CFP®

Jaye holds a B.A. degree from Northwestern University. She has been a career-long member of NATP, working for them as an instructor for over ten years. After completing 31 tax seasons, Jaye recently sold her practices and has retired from tax preparation. She has been an Enrolled Agent since 1997 and became an NTPI Fellow in 2010. Jaye is also a Certified Financial Planner (CFP®) and is registered with the NASD, holding Series 6, 7, and 63 securities licenses.

Amy Wall, EA, MBA

Amy M. Wall, EA, MBA, is part tax-geek, part money-geek, and part-science geek. With a BS in Chemistry and a second major in Economics from the prestigious Harvey Mudd College of the Claremont Colleges, as well as an MBA, she spent a good part of her life in the Defense Industry before electing to stop building bombs and make the move into Tax World. She worked with individuals, small businesses, S Corporations, and began working with virtual currency clients back in 2014, just after the first IRS regulations were released. Recently retired from her private tax practice in Tucson, Arizona, Amy now spends her time teaching and writing on taxation.

Andrew Mark, CPA

Andrew Mark has been a CPA since 1993 and has a BS degree in Finance from Arizona State University. A second-generation CPA, Andrew started his CPA firm in 2002. He has been an Arizona NATP certified instructor for over ten years. During that time, he has taught numerous topics including tax law changes on both a federal and Arizona level. He 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.

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 Gudgel, EA, PhD

Katherine started preparing taxes as a VITA volunteer in 2011 in Illinois. She found she had a love for taxes and became an Enrolled Agent in 2015. When she moved “back home” to Tempe in 2017, and started her own tax practice, Gudgel Professional Services, she chose to specialize in helping seniors and trusts. In addition to preparing taxes, Gudgel Professional Services provides Daily Money Management services.

AZ NATP ANNUAL CONFERENCE
2023 THEME: BE A TAX HERO

Have you ever had a regular client come in during tax season and you expected everything to be "same as last year", but it isn't! Sometimes changes in our clients' lives, may result in significant tax impact. Let's make sure you are prepared. This year's topics:

- Tax Planning and Financial Teamwork: Tax Planning is a whole lot more than just tax preparation, and cannot be done in a vacuum. Appropriate tax planning involves input from tax professionals, financial planners, estate planners, and insurance agents. This practice management session will discuss how tax professionals can build their practice through tax planning services and networking with other financial professionals to become their clients' superhero. (Practice Management, no IRS CE)
- You've Inherited, Now What?: Inheritance of property, money, or other investments from a decedent can come with a dizzying array of tax consequences and potential pitfalls. The tax professional is often called upon to help the beneficiary sort through the maze of regulations and assist their client with minimizing the tax burden of their inheritance. Learn how to be a tax hero by helping the beneficiary through this confusing time. (4 CE)
- Oops, I forgot to take depreciation - Correcting Depreciation Errors: Learn how you can be a hero to your clients and fix years of depreciation errors with Form 3115. We will go through the eight-page form and show you line by line how to complete it with detailed examples. When finished you'll be able to confidently and quickly fix your clients' errors. (2 CE)
- Non-Profits – Operations and Form 990: A non-profit organization is an organization that uses surplus revenues to achieve its goals rather than distributing them as profit or dividends. Most are designated as "eligible" for tax-exempt status under IRC §501(c). In this session, we will describe the life cycle of a tax-exempt organization from formation through dissolution and highlight the compliance requirements to preserve the organization's valuable status. (2 CE)
- Schedule C – Hobby or business? Schedule C, Profit or Loss From Business (Sole Proprietorship), is used to report income or loss from a business operated as a sole proprietor. With taxpayers engaged in gig activities or trying to make money from an activity they enjoy, tax professionals need to determine if these activities qualify as businesses or should instead be considered hobbies. This webinar will introduce the Schedule C of Form 1040 and provide the knowledge of when it needs to be filed and what information should be gathered from clients. (2 CE)
- Filing Schedule C for Microbusinesses: We'll explore the endless issues associated with filing Schedule C, Profit or Loss From Business (Sole Proprietorship). We'll review the steps to complete a Schedule C (Form 1040) for 2023 tax year filing, including cost of goods sold, vehicle expenses, depreciation for small business assets, mixed usage of services such as cell and internet, and the inevitable home office. (2 CE)
- Divorce Taxation: Untying the Knot: Given the divorce rate, there's no avoiding it: you're going to have clients considering, in the midst of, or suffering the after math of, divorce. Some of the most common questions surround topics of determining if a payment is alimony or child support, determining which taxpayer is the custodial parent and which is the noncustodial parent, and if applicable, who may claim the child(ren) on their tax return. This class addresses the issues your clients will face before, during, and after a divorce has been finalized. We'll also discuss Form 8379, Injured Spouse Allocation, and Form 8857, Request for Innocent Spouse Relief. (2 CE)
- Be a Tax Hero, Ask the Panel: Many sole-practitioners have clients with tough tax questions, but may not have a colleague to help brainstorm the solution. During the conference, did you realize that a presentation addressed an issue you had researched, but you would like to ask a subject matter expert about the application to a particular client situation? Or perhaps you have questions about the latest tax law changes and want to make sure you understand it correctly. Here's your opportunity to address your federal tax-related questions to a panel of experienced professionals. Note that questions must be submitted by noon Friday August 18 in order to enable proper reporting for CE. (2 CE)

IRS-APPROVED CONTINUING EDUCATION PROVIDER

AZ NATP ANNUAL CONFERENCE
August 16-18, 2023

Wednesday August 16, 2023

3:00 pm to 5:00 pm	Registration	Board Members/Volunteers
5:00 pm to 6:40 pm	Tax Planning and Financial Teamwork (Practice Management no CE)	Lin Leclair, EA; Jaye Tritz, EA, CFP; Katherine Gudgel, EA

Thursday August 17, 2023

7:30 am - 8:05 am	Registration	Board Members / Volunteers
8:05 am to 8:15 am	Welcome	President, Liliana Davalos, AFSP, CAA
8:15 am to 9:55 am	You've Inherited, Now What? Part 1 (2 CE)	Jaye Tritz, EA, CFP®
9:55 am to 10:15 am	Break	
10:15 am to 11:55 am	You've Inherited, Now What? Part 2 (2 CE)	Jaye Tritz, EA, CFP®
11:55 am to 1:15 pm	Lunch and Annual Chapter Meeting	
1:15 pm to 2:55 pm	Oops, I forgot to take depreciation - Automatic Changes Form 3115 (2 CE)	Andrew Mark, CPA
2:55 pm to 3:15 pm	Break	
3:15 pm to 4:55 pm	Non-Profits and Form 990 (2 CE)	Jaye Tritz, EA, CFP®

Friday August 18, 2023

7:30 am - 8:00 am	Registration	Board Members / Volunteers
8:00 am to 9:40 am	Schedule C – Hobby or Business? (2 CE)	Amy Wall, EA, MBA
9:40 am to 9:55 am	Break	
9:55 am to 11:35 am	Filing Schedule C for Microbusinesses (2 CE)	Amy Wall, EA, MBA
11:35 am to 12:35 pm	Lunch	
12:35 pm to 2:15 pm	Divorce Taxation: Untying the Knot (2 CE)	Amy Wall, EA, MBA
2:15 pm to 2:35pm	Break	
2:35 pm to 4:15 pm	Be a Tax Hero, Ask the Panel (2 CE)	Panel: Speakers and AZ NATP Board Members
4:15 pm to 4:30 pm	Closing, AZ Bucks Winner	President, Liliana Davalos, AFSP, CAA

Disclaimer: Sixteen hours of Continuing Education (CE) will be issued to Enrolled Agents. Lawyers, CPAs and other professionals are responsible for reporting the continuing education credits in accordance with the requirements of their regulating or certifying organizations. They may obtain continuing education credit depending on those requirements.