



MONDAY DECEMBER 4, 2023

Tucson, Arizona

AZ NATP 2023 Tax Update

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

Course Descriptions

I've got Ethics: Welcome back to Imagination Land Tax Services where The Old Woman in the Shoe has her taxes done. We will travel down the trail of ethics and compliance exploring more twists and turns with Old Woman, her extensive family, and new friends. Though bedtime stories are normally at night, come join us for sunrise ethics guaranteed to keep you awake!

2023 IRS Federal Tax Update: Each year the AZ Chapter of NATP presents the latest updates on tax laws and issues, but this year it is expanded to include 4 hours of federal tax updates. Topics will include the latest on 1099-Ks, K-2 and K-3 reporting, Corporate Transparency Act, energy credits, and much more.

Tax Issues for Married Filing Separately: As tax professionals, we know that marital status (and residency) affects filing status and that married taxpayers may choose between married filing jointly and married filing separately. However, depending on where they live (i.e., a community property state vs. a common law state), they may not have as many choices on how to split the income and expenses. Tax benefits may also be reduced if filing separately. We will determine the taxpayer's marital status, their most advantageous filing status, and evaluate various income sources and tax benefits.

2023 Arizona Tax Update: The AZ NATP Tax Update seminar is one of only a handful of workshops where Arizona Tax Topics are presented by tax practitioners. We will review legislative changes including updates to Pass-Thru Entity (PTE) and Small Business Income (SBI) taxes, the new AZ Families Tax Rebate, adoption expenses, applicable property tax laws and more!

**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
Jaye Tritz, EA, CFP

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 2023 Tax Update

Schedule

| | | |
|----------------------|--|----------------------|
| 7:00 am to 7:30 am | Registration | Speakers |
| 7:30 am to 9:10 am | Ethics: A Trip to Fantasy Land (2 hr) | Lin Leclair, EA |
| 9:10 am to 9:25 am | Break | |
| 9:25 am to 11:05 am | 2023 Federal Tax Updates (2 hr) | Jaye Tritz, EA, CFP® |
| 11:05 am to 12:00 pm | Lunch | |
| 12:00 pm to 1:40 pm | 2023 Federal Tax Updates (cont) (2 hr) | Jaye Tritz, EA, CFP® |
| 1:40 pm to 1:55 pm | Break | |
| 1:55 pm to 3:45 pm | Tax Issues for Married Filing Separately (2 hr) | Katherine Gudgel, EA |
| 3:50 pm to 4:40 pm | 2023 AZ Tax Update (1 hr) | Katherine Gudgel, EA |
| 4:40 pm - | Closing Remarks, Drawings, and 50/50 Raffle | |

Registration Fees

NATP Member

Non-Member

Early: By Nov 15, 2023

\$224

\$254

After Nov 15, 2023

\$254

\$284

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 November 27, 2023. After this date, please register at the event.

Registration is refundable (less \$50 cancellation fee) if requested by Nov 27, 2023.

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

~~Arizona NATP is an
Award Winning Chapter~~



Follow us on Facebook: **AZNATP**

Visit our page: www.aznatp.com

Our Speakers for AZ NATP 2023 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 Gudgel, 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. Katie is also the current Vice President of AZ NATP.



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 and is a member of the AZ NATP Board of Directors. 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.

