



**DECEMBER 6, 2021**

**Tucson, Arizona**

Venue

**Viscount Hotel**



**4855 E. Broadway**

**Tucson, AZ 85711**

**Reservations: 520-745-6500**

# AZ NATP 2021 Tax Update

Join us for up to 8 hours of Federal CPE and  
1 hour of Arizona Education

## Course Descriptions

Ethics and Compliance and the Old Lady in the Shoe: We will explore how to handle the entire family's tax return with required disclosures and meet current IRS due diligence rules.

2021 Arizona Tax Update - Update and review of 2021 Arizona Tax topics.

2021 IRS Federal Tax Update - Update and review of 2021 Federal tax topics.

Basics of Basis: Basis is a fundamental component which affects the amount of depreciation calculation for gain or loss and determination of the basis of any property acquired as part of a transaction. Including: Identification Lump-Sum, Purchase Stock Dividends, Stock Splits and Stock Rights, Gift Basis, Like-Kind exchanges among others.

Dependents in 2020 and 2021: For 2020 and 2021, not only have the credit amounts been modified, but the "rules" for which dependents may qualify have also changed.

## Registration Fee

	<u>Member</u>	<u>Nonmember</u>
Early	\$179.00	\$199.00
After Nov. 18, 2021	\$199.00	\$219.00

Register online at [www.natptax.com/Chapters/Pages/ArizonaChapterEducation.aspx](http://www.natptax.com/Chapters/Pages/ArizonaChapterEducation.aspx)

For more information visit [www.aznatp.com](http://www.aznatp.com)

Registrations must be received by NATP by close of business December 3, 2021. After this date please register at the event. Cancellation deadline 11/25/2021 with a fee of \$50.00.

## 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

Sara Leone, CPA

Katherine A. Gudgel, PhD, 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!

## Schedule

7:00 am to 7:30 am	Registration
7:30 am to 9:10 am	Ethics Compliance and the Old Lady in the Shoe
9:10 am to 9:20 am	Break
9:20 am to 11:10 am	Dependents in 2020 and 2021
11:10 am to 12:10 pm	Lunch provided
12:10 pm to 1:50 pm	2021 Federal Tax Update
1:50 pm to 2:00 pm	Break
2:00 pm to 3:50 pm	Basics of Basis
3:50 pm to 4:40 pm	2021 AZ Tax Update
4:40	Wrap Up - Drawing AZ Bucks

**~~Arizona NATP is an  
Award Winning Chapter~~**



**Follow us on Facebook: AZNATP**

**Visit our page: [www.aznatp.com](http://www.aznatp.com)**

*\*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.*

## Speakers

### 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 Tax Professionals. Lin is currently the Treasurer of the Arizona Chapter of the National Association of Tax Professionals. Lin is the founding partner and President of 1st Choice Tax Service, Inc. She and her Husband Dan along with their children and grandchildren reside in Tucson.

### Sara Leone, CPA



Sara Leone owns a tax practice which specializes in individual, small business, and Subchapter S corporations while also being a faculty at the University of St. Francis (Joliet, IL). Sara was awarded the Outstanding Accounting Educator Award by the Illinois CPA Society. Sara's passion for combining education and practice is a natural fit with NATP. She currently serves on the Education Committee of the Arizona Chapter and was recently elected to the full board. Sara also currently serves as a national board member of Delta Mu Delta, the international honor society in business.

### Katherine A. Gudge. PhD. EA.



As an Enrolled Agent, Katie specializes in helping seniors and trusts. 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. 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. With this program, she progressed from volunteer preparer, to lead trainer. She also developed a passion for helping individuals better understand money.