

Kansas



National Association  
of Tax Professionals

# THE INFORMER

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## Your President's Message...

Hi Everyone!

I hope that your tax season went well and that you can relax and enjoy other interests now. With the end of the season, it may be time to think about education for the next tax year. NATP, both National and Kansas, offer several opportunities for great continuing education. We all need good education because of the new tax laws coming down from the legislature. Just heard today that if the Kansas senate budget bill is passed by the house and signed that the statute for refunds would change from 2 years to 1 year.

Your Kansas board of Directors met in Overland Park on April 30, 2009. On May 1, 2009 we were invited to attend a Practitioner Liaison Meeting at the Kansas City Service Center. Larry Orozco, Central Area Manager Stakeholder Liaison invited practitioner groups from Missouri, Nebraska, Illinois, and Oklahoma to tour the service Center. This was the first time an area-wide PLM was conducted.

As the President of the KS Chapter I was invited to a working lunch with a representative from an organization for every state and IRS personnel: Larry Orozco; Jeff Stitma, Field Director for Compliance Service; Jeffrey Basalla, Director of Filing and Payment Compliance; Patricia Carman,

Operations Manager of ACS Call Site, KC Campus.

Issues discussed included the length of time that it takes to get POA on the system when faxed to Ogden. Currently it takes about 4 days and if faxed to an IRS representative it may never be on the CAF system and has to be faxed again. Most attendees were in agreement that if a tax practitioner faxes a Form 2848, it should be entered into the system faster.

With respect to ACS, are the call-backs from the supervisors being done timely? We agreed as a group that there is a problem and suggested that e-mail be used for contact. It was pointed out that we need a secure mailbox similar to the E-Services program.

Also, AUR needs to be make response time consistent and fair. Tax practitioners have 30 days to respond to an issue while the IRS representatives have 45 days.

I will have printed notes on this meeting included in the next newsletter. I feel that the IRS representatives listened to our concerns and we listened to theirs.

Well, more next time. Until then, go enjoy one of Kansas' best seasons.

Peggy Beasterfeld, President

## **IRS News.....**

**3/5/2009** After conducting extensive reviews, the IRS is not renewing the contracts with the two private collection agencies. The IRS has determined that the work is done best by IRS employees who have more flexibility in handling cases. They have also determined that it is more cost effective to have IRS employees deal with the issues, as opposed to hiring a private debt collection firm.

**3/13/2009** As of March 9, 2009 the IRS is going to eliminate inserts which they have been sending along with letters to business informing them of taxes due. In an effort to provide more information to the business, and to anticipate and answer taxpayer questions the IRS had been sending as many as 13 inserts in each notice. Many businesses, and tax preparers have complained about the unnecessary inserts and field tests indicated that the inserts made little difference. The CP 161 notice will now contain only two inserts, which will reduce the amount of paper used as well as reduce the cost of expenses.

**4/09/2009** Under the American Recovery and Reinvestment Act the first \$2400.00 of unemployment benefits an individual receives are tax free. This provision applies only to benefits received in 2009. Normally, all unemployment benefits are taxable.

For more IRS information, please go to the IRS website, [www.irs.gov](http://www.irs.gov).

### **Historical Highlights of the IRS, cont'd**

1913 - As the threat of war loomed, Wyoming became the 36th and last state needed to ratify the 16th Amendment. This amendment stated “ Congress shall have the power to lay and collect taxes on incomes, from whatever source derived, without apportionment among the several states, and without regard to census or enumeration.” Later, Congress adopted a 1% tax on net personal income of more than \$3,000 with a surtax of 6% on incomes of more that \$500,000. It also repealed the 1909 corporate income tax. The first Form 1040 was introduced. To view the 1913 tax return, go to the IRS website, type “brief history of IRS” in the search line. Then click on the 1913 Form 1040 link.

More History in upcoming issues!

## **Kansas News.....**

Kansas has a pretty good website available to assist us with various areas of tax preparation. Many tax preparers are also accountants and bookkeepers. The Kansas website offers forms and publications, electronic services, information for sales and use tax, payroll taxes, property valuations, a section for Tax Practitioners, and much more. And if you need to speak to someone about an issue, you can call 785-368-8222 and there's usually someone there who can help.

Also, check out the “2 year refund time reduced to 1 year” thing Peggy mentioned.....

For more Kansas information, go to [www.ksrevenue.org](http://www.ksrevenue.org).

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## Training and Education

Spring means the end of the “tax season rush”. It also means it is time to begin thinking about our education. Whether we are Enrolled Agents, CPA’s, Accredited Tax Advisors, Financial Planners, or other credentialed tax professionals, we must begin taking classes and attending seminars to fulfill our required CPE’s.

Each year we hear more and more often that the legislature is looking to “license” the tax industry. There are already many rules and regulations which we must abide by. As professionals we need to become educated in as many aspects of tax preparation as possible. If you specialize in one area, you must still have a general knowledge of others. Nobody can be an expert in everything, but we can be knowledgeable in many areas of the tax codes and regulations as a whole.

This year NATP is again offering a variety of seminars to help educate our members. Taught by qualified tax professionals, these courses can benefit any tax professional on any level, from basic to advanced. There are live workshops, self-study, and on-line courses.

The NATP National conference is coming up soon. It will be held July 20 –23, 2009 in Reno, NV. It is possible to acquire up to 33 CPE’s in one week. Many topics are covered, and most seminars are offered more than once.

Also, NATP will again be offering the “Essential 1040” and “Beyond the 1040” later this year in Wichita and Overland Park. Two good days of information, Q&A sessions, and up to 16 hours of credits at each location. Watch the newsletter for more information and registration forms.

Go to [www.natptax.com](http://www.natptax.com) and click on “Education”. You will not be disappointed by the choices. While you are on the website, check out the Summer Tax Workshops. Some interesting topics, some interesting places to go!

## What happened in your office this year?

At our last board meeting it was suggested that we have a section in our newsletter just telling a few anecdotes from our prior year filing seasons. The stories can be funny, serious, or just plain outrageous and unbelievable. Please keep in mind that we can *not* release any confidential information. We will print as many of the stories as we have room for. We will only print your initials and city at the end of the article. Remember to use the following guidelines:

- #1. No names, addresses, SSN’s, or other information that would identify the person involved.
- #2. Keep your story as brief as possible.
- #3. No foul language or derogatory comments.

Just e-mail your story to [jmschultz@kans.com](mailto:jmschultz@kans.com) by 06/30/2009 to be included in the next issue.  
Please include your name & contact info in case we need to clarify something.

As members of NATP we sometimes take for granted all the information and services NATP offers to assist us in our businesses, both during tax season and during the off-season.

In addition to providing us with recognition by being a member of a professional organization, NATP also offers tax information, answers to tax questions, and more. NATP offers many training and continuing education opportunities, both to members and non-members. There are conferences, forums, seminars, and even self-study courses available, and in most cases, CPE credits are offered.

Through the website you can access these services by clicking on Tax Research, Membership, Chapter, Member Recognition, Education/CPE, and there's even a "Tax Store" where you can buy folders, brochures, and other products for your office.

Also, please take the time to review the Government Relations pages. NATP keeps us informed of the latest happenings.

### **NATP National Conference**

July will be here before you know it! The national conference will be held in Reno, NV from July 20-23, 2009 at the Grand Sierra Resort and Casino. Many educational seminars are planned, along with activities for chapters to meet and greet participants. Those who have gone in the past say they really enjoy the conferences and gain a lot of useful information from them. Just go to the NATP website and click on "Education/CPE". There, you can sign up for the conference online.

While you are in Reno, enjoy the local attractions. Or drop a few nickels in the slots. You know the old saying "All work and no play....." So, go ahead, play a little!

**Don't Forget.....  
NATP National Conference, Reno, NV  
July 20,21,22,23, 2009  
Find info at [www.natptax.com](http://www.natptax.com)**



### **IMPORTANT DATES**

#### **NATP Conference**

**Reno, NV July 20—23, 2009**

#### **KS Chapter Annual Meeting**

**Wichita, KS Oct 19, 2009**

#### **NATP 1040/1040X**

**Wichita, KS Oct 20—21, 2009**

**Overland Park, KS Nov 16—17, 2009**

#### **KS Chapter Fall Seminar**

**Overland Park, KS Date undecided**

#### **IRS E-file Seminars**

**Overland Park Oct 27—28, 2009**

**(Same seminar offered twice)**

**Topeka not scheduled yet**

**Wichita not scheduled yet**

**Salina scheduling undetermined**

**Garden City No seminar**

**Hays No seminar**

***You know it's Monday when your horoscope says:  
"It's like you have your own gravitational pull for freaky characters today. You'll have interesting stories to tell tonight."***

**Long ago when men cursed and beat the ground  
with sticks it was called witchcraft.  
Today it's called golf.**



**Hello Springtime! I'm ready for summer!**

It's been a good year for me. While the number of clients is down a bit, the people who have come in this year have been wonderful to work with. For the first time ever in my career I haven't had the whiners, gripers, or complainers, the uncontrolled children, the non-payers, the boxes of disorganized paperwork, the stressed-out taxpayers, (I often refer to these clients as my "problem children") or any of the other problems I usually associate with tax season.

To what do I attribute this change? I don't know for sure, but I think it may have been the letter I sent to my clients in December. For several years I have been dealing with a medical issue which finally landed me at Mayo Clinic in November of 2008. When I returned I realized that I would not be able to work 24/7, business-as-usual this year. At many seminars I have heard speakers talk about how they required their clients to be up-to-date with their records, organized, honest, etc., or they "fire the client". I thought it sounded like a stupid idea, but decided I really need to get my clients to take on more responsibility for their own returns.

So, I asked my clients to please make every effort to get their paperwork organized and encouraged them to make their appointments early. I gave them a list of the items and information we always need, as well as things most often overlooked or forgotten. I told them this would reduce the time and stress of running back and forth to get additional information, as well as reducing their turn-around time. I stated that there would be additional charges for bookkeeping services, beginning at \$100 and up, if their records were not current and organized. For those with children, I offered to supply a babysitter at \$10.00/hour, minimum of one hour.

This may seem like it's way too simple to get results, but it has worked! A few clients (mostly "problem children") chose to go elsewhere, but that doesn't concern me too much. There will always be someone who isn't happy with the services a tax preparer offers no matter what you do. Unfortunately, taxpayers will always find someone who *will* do the return the way they want it done.....right or wrong. Some people just bounce from one tax preparer to another every year anyway. Some will always try that "free on-line internet thing" at least once! And taxpayers will always be able to find someone who charges less.

I only had to "fire" one client and I haven't had to sort through boxes and bags of unnecessary information and old junk mail. Books and records were in order. Taxpayers made appointments and left their children with Grandma. You know, I didn't have one taker on that babysitter offer! Yes, indeed, a very good tax season!

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## TIP:

Send “Thank You” cards to your clients. It has been said that if you don’t, your competitor will be glad to do it for you.

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