



Florida NATP

WINTER/SPRING 2009-2010



Letter from the President

Merry Christmas and Happy Holidays,

Dear Members,

I'm proud to be writing this letter to you as your new President of the Florida Chapter! You might recognize my name from this newsletter because I'm also the Newsletter Editor. I was honored by the nomination from the Board to step up from Secretary to President. I'm looking forward to a successful and growth-filled first year as President. I'm open for suggestion, so please never hesitate to contact me at amybr@earthlink.net. I want the Florida Chapter to be the Best Chapter NATP has.

The Board elected a new Secretary as well—Troy Eckhardt. The Vice President remains the same—John Rudstedt; the ever faithful Treasurer, Stuart Miller, has also remained in his position. Leland Becton and Troy Eckhardt were re-elected to the Board for another 3 year term. This is going to be a great year!

We have some superb Educational Events coming up in the next 6 months. We are starting January off with a bang! We have 2 Conferences for you to attend - Clearwater on January 7, 2010 and Daytona Beach on January 8, 2010. These are great Conferences to get updates and other information that you may need plus CPE credit. We all know how important CPE credits are! In May, there is a HUGE conference with our guest Speaker Beanna Whitlock! We are so excited she is coming to Daytona Beach to speak at our Conference. She was a Speaker at the National Conference and she was phenomenal. The attendees raved about her classes. She is going to come to you! This is a great time to get CPE credits and learn from a true expert in the field. Register today! This newsletter has registration forms and information for all 3 Conference. This is the most important newsletter ever! So, don't wait to register because these Conferences will fill fast.

It is coming up on a new Year and times are uncertain, but this is a great time to look at the many things around you and focus with gratitude and love on the many things we do have. The New Year will bring challenges but it is a good time to bring the positive thoughts to the forefront, so we can head into a potentially chaotic tax season with a positive mind frame. Please remember some of the benefits of NATP as you go into Tax Season, the Research Team is ready for you. Don't forget about them, they are a great tool for your business. Plus the NATP store has the Educational Materials to make your season run smoother. NATP also has State Volunteers for you to call on, plus remember your network of friends that you made attending our Conferences. They are the best tool ever.

I look forward to this year to serve as your President. I'm here for you and look forward to meeting as many of you as I can. Also, we are now on Facebook. Please look us up - Florida NATP. Become our Friend!!!

Warmest regards and best Wishes for a Merry Christmas and Happy Holidays!

Amy Brosnan, President



This newsletter article is written by an NATP member from the Florida Chapter. The newsletter has sent out requests for members to contribute. She wrote about her business to share with Members of our Chapter. I hope you find this as interesting as we did. Feel free to contribute to the newsletter by contacting amybr@earthlink.net. It's your newsletter, make it your own.

Tax Preparation In Your Home

By: Luella Wilson, NATP Florida Chapter Member

Tax Preparation In Your Home started in 1953 when as a freshman in Siena College, Loudonville, New York, I took an Accounting course. In this course we prepared an income tax return. It really didn't seem too difficult. I really couldn't see why my father was paying someone to do his return. I offered to prepare it for him, but of course, he didn't think I knew what I was doing. He had his accountant check it and received the word that it was correct. He was so surprised and happy that his daughter could do something like that. He told his friends and so – Tax Preparation in your Home was started. It was extra spending money and I enjoyed it.

Things continued on a part time basis until 1976 when the Doctor whom I had assisted for 22 years decided to retire and I was no longer a physician's assistant/medical technologist. It was in the summer and soon after the H & R Block office in Saratoga Springs, New York, offered a course in tax preparation. This was right up my alley. I really enjoyed doing taxes and now I could learn more. I worked for them many years, even across the country, as my husband was a nuclear welder and when our children grew up we purchased an Airstream trailer and hit the road. Where ever we happened to be come tax season I offered my services both to the local people and H & R Block – Tax Preparation in your Home was still in business. This of course, was mainly because I had no office for people to come to. Taxes were done on paper and mailed in. It was great.

By 2002, I decided I had better get with the program as they say and I purchased software and started filing online. By now I had been using a computer to prepare taxes for a while because on our arrival to Florida in 1986, I went with a Jackson Hewitt office and they used computers. I always enjoyed the office atmosphere. We had a great time and as much as I love to serve my clients (friends and family); I also enjoy working with people who can talk IRS language with me. This is also why I love NATP.

I attempt to give above excellent customer service to my clients. I go into their home or office and prepare their taxes or review older prepared returns. I can see what they have, how they live and I do believe I can do a better job in this atmosphere as I can evaluate what credits they might be entitled to, paperwork is available (no files on hold waiting for info), what should be reported and I can explain why. I give them a printed copy of what will be electronically filed and once I receive an acceptance from IRS I send them a thank you card with a 9325 showing all the info about their filing along with referral forms to give to their friends. At Thanksgiving I usually send a card and enclose a business card and refrigerator magnet. I am available 24/7 for my clients via email and phones – cell phone and home phone. They greatly appreciate the fact they can get to me at any time and if I don't have the answer I will get it and get back to them quickly.

Tax Preparation in your Home has been a very lucrative business for me and maybe some of you might even enjoy this type of tax preparation.

We are on Facebook. Look up Florida NATP and become our Friend. State Updates when available and Special Information will be on the site, so join us today!!!

Clearwater Workshop



CLEARWATER WORKSHOP
JANUARY 7, 2010
THE CLEARWATER GRAND HOTEL
20967 US 19 North, Clearwater
1-727-799-1181

TIME: 11:30 am -12:00 pm	Registration and Networking
12:00 pm -12:50 pm	Latest IRS Issues
1:00 pm - 2:40 pm	Long Term Care Insurance
2:40 pm - 2:55 pm	Break and Networking
2:55pm - 3:45 pm	1040 Update and Due Diligence



COST: \$50.00 for members includes material and break
\$60.00 for non-members includes material and break

SPEAKERS AND TOPICS:

Robert (Bob) Budde IRS Collection Group Manager: Collection issues and how we can work with our clients and the IRS during this financial strain.

Marsha Reiniers: CLTC is a Long Term Care Insurance Specialist. She represents Genworth Financial. Long Term Care, What it is, when it is needed. Risks and costs. Tax qualified vs. Non Tax Qualified Policies. LTC insurance and the Federal Income Tax Benefits for businesses with specific detail for self-employed, sole proprietor, partnerships, S-Corporations and C-Corporations) and the new Florida Partnership long term care program and what it means for your clients.

Bibi Rudestedt, EA: 1040 Update and Due Diligence, New Rules on Dependents, Engagement Letters and more.

These classes approved for 4 CPE Hours.

Registration:

Name: _____ **Member ID:** _____

Address: _____

City: _____ **Zip Code:** _____

Phone: _____ **E-mail:** _____

Please send your registration form with checks made payable to Florida NATP to: Florida Chapter NATP, 13015 Spring Hill Dr., Spring Hill, Florida 34609.

By Credit Card: AMEX ___ **M/C** ___ **VISA** ___

Account Number: _____ **Exp.** _____ **Panel Code** _____

Signature: _____

If paying with credit card the registration can be faxed to: 352-686-0215 or E-mailed to johnfnatp@earthlink.net.

Any requests for refunds of the registration fee must be made in writing to the Chapter Treasurer by the close of the business on December 28, 2009. The request will be honored after deducting a \$25.00 administration fee. Refunds will not be honored if received after December 28, 2008 close of business. All requests should be mailed to: Stuart Miller, Treasurer, FL Chapter of NATP, 18551 N. Miami Ave, Miami, FL 33169-4526.

Daytona Workshop



DAYTONA WORKSHOP

JANUARY 8, 2010

DAYTONA STATE COLLEGE

(formally Daytona Beach Community College)

International Drive (Highway 92)

Building 110 (the Bergengren Building), Room 102 (on the 1st floor)

TIME: 8:00AM to 5:10PM

COST: \$65.00 early registration by December 30, 2009

\$70.00 registration after December 31, 2010

REMEMBER SPACE IS LIMITED!!!!

SPEAKERS AND TOPICS: *

- **SAMUEL B. ECKHARDT, JR, EA:** Florida Department of Revenue Collections.
- **Kevin Luby, AAMS** with *Stifel Nicolaus & Co.*: Roth IRA conversions
- **Marshall Barkin** an attorney in *Daytona Beach*: Estate Planning and other end of life issues
- **EDGAR KIDD** with *the IRS*: Collections, Installment Agreement, procedures, foreclosures, electronic Filings, tax law updates, and IRS Policy and Procedure Updates
- **Jennifer Ferguson, CFP** with *Raymond James Financial Services* and **Elaine Marvin, CFP** with *the State Life Insurance Co.*: Long Term Care planning and new tax advantage ways to provide for such care

These classes are CPE approved for 8 hours.

Written proof of attendance will be supplied.

Courses on taxation and financial planning qualify for technical business CPE credit for Florida CPAs.

If you are interested in attending this workshop, please contact Owen Oatley at 204 Shady Place, Daytona Beach, Florida 32114 or call him at 1-386-258-8738. Register



Florida Chapter of NATP Board Members 2010

As of 11/30/09 Chapter phone: 1-866-802-8594

OFFICERS:

President: Amy Brosnan
Vice President: John S. Rudestedt
Secretary: Troy Eckhardt
Treasurer: Stuart J. Miller

Board Members:

	<u>Term Ends</u>
<i>A. Leland Becton, EA</i> 1199 Brentwood Court Port Orange, FL 32129	Voice: (386) 763 - 0110 Fax: (386) 763 - 0110 E-mail: albecton@cfl.rr.com 2012
<i>Amy E. Brosnan</i> 13015 Spring Hill Dr. Fax: Spring Hill, FL 34609	Voice: (352) 686 - 0220 Fax: (352) 686 - 0215 E-mail: amybr@earthlink.net 2010
<i>Kenneth Dowdall, EA</i> 1701 E. Atlantic Blvd. # 4 Pompano Beach, FL 33060	Voice: (954) 941 - 1160 Fax: (954) 941 - 1160 E-mail: knyyd@earthlink.net 2010
<i>Troy Eckhardt,</i> 1133 Glenwood Rd. Deland, FL 32720-2133	Voice: (386) 736 – 7001 Fax: (386) 740 – 8293 E-mail: teeckhardt@biztaxpros.com 2012
<i>Stuart J. Miller</i> 18551 N. Miami Ave. Miami, FL 33169-4526	Voice: (305) 705-0529 Fax: None E-mail: studebjeni@att.net 2011
<i>John S. Rudestedt</i> 13015 Spring Hill Dr. Spring Hill, FL 34609-5048	Voice: (352) 686 – 0220 Fax: (352) 686 – 0215 E-mail: jobirudestedt@msn.com 2011
<i>Laura J. Wood, EA</i> 650 S. North Lake Blvd. Suite 530 Altamonte Springs, Fl 32701	Voice: (407) 869 – 5766 Fax: (407) 869 – 5207 E-mail: laura@namsinc.net 2011

We are here for questions! Please let us know if we can help you.



Spring Conference
Speaker: Beanna Whitlock, EA
Daytona Beach Hilton, 100 N. Atlantic Blvd.
1-800-HILTONS
May 21, 2010

Topics: 8 CPE Hours

Kids are the Darndest Things - A comprehensive approach and reference tool to the host of benefits on the taxpayer's individual federal income tax return utilizing the benefit of children. From dependency exemption to credits learn what the new definition of "child" has brought to tax planning.

The IRS - What we can expect now!

With a new administration, a relatively new commissioner and an ever changing IRS workforce what can the tax professional and taxpayer representative expect from the Internal Revenue Service. Will the economy affect our tax practice and more importantly what will the effect of the economy have on the compliance of taxpayers. Learn what the tax professional must do to protect themselves if they continue to be in the business of tax.

Tax Potpourri

The oddities of tax preparation ranging from ministers to gambling, from adoptions and foster care to medical transplant costs are examined in this fast paces presentation and also latest important tax laws. The presentation tests the most experienced of tax preparers and prepares all return preparers for what might come their way.

Reasonable Compensation - What is reasonable compensation? Discover why the IRS is concerned that your client who works in the business is taking reasonable compensation. Learn what to look for in each of your client's compensation package to determine if there is reason for concern. Be challenged by the two "tests" what every S-Corporation Shareholder should take regarding reasonable compensation and the danger of that lurks if the IRS reclassifies distributions as wages.

Price includes Educational Material, Networking, Breaks, and Breakfast.

Members: \$175.00

Non-Members: \$210.00

*****Special Room Rate with the Hotel: \$135.00*****

Registration:

Name: _____ Member ID: _____

Address: _____

City: _____ Zip code: _____

Phone: _____

E-mail: _____

Please send your registration form with checks made payable to Florida NATP to:

Florida Chapter of NATP, 13015 Spring Hill Dr., Spring Hill, FL 34609

By Credit Card: Amex _____ M/C _____ Visa: _____

Account number: _____ Exp: _____ Panel Code: _____

Signature: _____

If paying with credit card the registration can be faxed to: 352-686-0215 or E-mailed to johnflnatp@earthlink.net.

All requests for refunds of the registration fee must be made in writing to the Chapter Treasurer by the close of the business on May 15, 2010. The request will be honored after deducting a \$25.00 administration fee. Refunds will not be honored if received after May 15, 2010 close of business. All requests should be mailed to: Stuart Miller, Treasurer, FL Chapter of NATP, 18551 N. Miami Ave, Miami, FL 33169-4526.



Upcoming Conference Dates: (Quick Reference Guide)

January 7, 2010 - Regional Conference

Clearwater Conference

January 8, 2010 - Regional Conference

Daytona Conference

May 21, 2010 - Spring Conference

Daytona Beach

July 19-22, 2010 - National Conference in Austin, Texas

November 5, 2010 - Annual Conference

Orlando



FLORIDA CHAPTER OF NATP

13015 Spring Hill Dr.

Spring Hill, Florida 34609