Hi, AZ-NATP Members,

Well, a great time was had in Baltimore—and more history in the area than we normally see around here. The education and instructors were great, and it was wonderful to see our own Dale Boushley, EA, teaching once again. NATP raised over $40,000 for the charity. That will be a tough number to top in 2013!

We are fast approaching our annual Conference. If you haven’t come to an Arizona Conference, I urge you to make this your first one. We are honoring our 25th Anniversary as an NATP chapter and will have lots of fun and food! Oh, and did I forget to mention, great education.

Lisa Ihm, who all the attendees last year loved, is going to be doing Part II of her Cancellation of Debt seminar. We are also having an instructor from ICE, who will show us how to tell those fake W-2s and 1099s, as well as give other information related to fraud and spotting false tax return information. Sam Whittle, EA, will give her usual entertaining and informative Ethics seminar. Marla Hampton (formerly De La Torre) will show us the new tricks for Form 8949 and Schedule D. 15 hours of CPE is available.

In addition, we will have a happy hour, banquet, and our auction to raise money for our charity, Arizona’s Children Association. JoAnn Schoen, EA, will represent National and will install our new officers.

You don’t want to miss this one—September 20th and 21st at the San Marcos in Chandler. Registration is available in this newsletter or on our website: http://bit.ly/AZChapterPage.

I look forward to seeing all of you our Annual Conference in September. Remember that this is your chapter and your board and I want to do all we can to make it the best chapter for you. If you have any suggestions, please call (928-284-4197) or email (sbarrett_ea@msn.com).

President’s Message
Submitted By: Sandy Barrett
sbarrett_ea@msn.com

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**Save The Date!**

- AZ NATP Annual Conference—September 20-21, 2012
- Arizona Update—Tucson—December 5, 2012
- Arizona Update—Phoenix—December 7, 2012

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**Board Nominations**

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**Stay Connected**

- Arizona NATP Twitter: @AZNATP
- Find us on Facebook! Search: AZNATP
Your AZ Chapter of NATP Nominating Committee is looking for members who are interested in leading this Award Winning Chapter.

If you or someone you know, has these attributes:
- Passion for your industry and fellow members
- Willingness to work alone, yet be part of a team
- Commit to attend 3-4 meetings per year, over a 3-year term; and
- Is a current member in good standing of NATP, Arizona chapter
- Has been a member of NATP for at least two years
- Is at least 25 years old
- Has completed a minimum of 20 CPE’s in each of the past two years as provided by NATP or AZ-NATP
- Has worked at least part-time two of the last five years in tax preparation,

Then that’s who we want!

Board member benefits include:
- Participating in a high-performing NATP chapter
- Providing input to education and activity offerings
- Mileage reimbursement for AZ NATP business
- Reduced cost for AZ NATP seminars
- Board meeting meal & hotel paid on AZ NATP business
- Partial reimbursement for attending National conference.

Three board positions are available for 3-year terms beginning January 1, 2013. Voting will be held at the AZ NATP annual meeting to be held at the San Marcos Resort in Chandler, September 20-21, 2012. Installation of Board members will also be held during that time period.

To nominate yourself or someone else to serve on the Arizona Chapter NATP Board of Directors, please send name and contact information ASAP to me, Kay Fredricks, as Nominating Committee Chairperson, and I will send out the necessary forms to be completed.

Kay Fredricks  -  Phone: 520-296-6623  -  Fax: 520-546-1902  -  Email: kay-tax@cox.net
In the 2010 law change, the donation amount was allowed to increase based on that Index. In 2012 it increased, so the donation amounts are at a maximum of $503 per individual and $1006 per married couple filing jointly.

"New" PLUS (Private Learning Uplifting Students) Tax Credit

This year the legislature enacted a new tax credit allowing donors to give an additional $500/$1000 to aid students who are on wait list and could not previously get into a private school. A donor must first give to maximum amount ($503/$1006) to the "original" Individual Tax Credit before they can claim the new credit.

2013 NATIONAL CONFERENCE
Submitted By: Debbie Connell-Duerre, EA
redsun1@qwestoffice.net

Have you heard the news? Mark your calendars now...

July 8-11, 2013
JW Marriott Desert Ridge Resort & Spa
Phoenix, AZ

Your AZ-NATP chapter represented YOU in Baltimore by handing out AZ information and brochures to the conference attendees interested in coming to AZ next summer. The committee workgroup leaders will be having a meeting on September 20th. We will keep you appraised of our activities!! If you have any ideas or thoughts, please contact me.
IRS Appeals Open House
Submitted By: Andrew Mark, CPA
Government Relations Committee Chair
andrew@ajmarkcpa.com

The IRS held an appeals open house on June 27. The meeting provided a unique opportunity to meet appeals officers and gain insight into the appeal function. The goal of appeals is to resolve tax controversies without litigation and to provide an independent look at the case. Throughout the presentations independence from the rest of the service was stressed to the point that one speaker suggested appeals may one day be separate from the IRS.

A discussion of new Ex Parte communication between Appeals and another Service function without the taxpayer or representative participating was discussed at length. The details are in Rev Proc 2012-18 and the Internal Revenue Manual is also being updated.

The two options for appeals location are available. The appeal can be heard in person in Phoenix or it can be done via mail and phone at a campus. 63% of appeals are campus sourced and their goal is to handle all but the most complex cases while leaving those to in person cases.

An appeal can have one of three outcomes. A full concession (taxpayer wins), full sustention (government position supported) and intermediate settlement. In an intermediate settlement gray areas are analyzed and based on the hazards of litigation a percentage or dollar settlement can be reached. Appeals is the only division that can settle a case based on litigation hazards.

As a means of fast tracking disputes and avoiding the appeals backlog alternative dispute resolution (ADR) for small business self-employed was discussed. With ADR cases a trained mediator assists with disputes resulting from examinations, offers in compromise, and trust fund recovery penalties. All appeal rights are retained if an agreement cannot be reached. More details can be found at http://bit.ly/IRS_ADR.

WE WON!
Submitted by: Lin Leclair, EA
Chapter of the Year Committee Chairperson
lin@1stchoicetaxservice.com

At the NATP National Conference in Baltimore the Arizona Chapter was honored to win the Communication Award in the Chapter of the Year (COY) Competition for the year 2011. We received a plaque as well as $150.00 check.

Our chapter submitted a book documenting everything that the chapter had accomplished during 2011. The COY book will be available at the September and December seminars so that you can review the submission.
IRS Liaison Meeting
Submitted By: Andrew Mark, CPA—Government Relations Committee Chair
andrew@ajmarkcpa.com

The IRS held its semi-annual liaison meeting on July 11. As this was during our annual conference in Baltimore no one from our organization was in attendance, however here are a few highlights from the minutes of the meeting.

Identity theft was discussed throughout the meeting. Criminal investigation, the Treasury Inspector General, and the Arizona Department of Revenue all stated this was an area with increasing activity. Arizona DOR alone stopped $11 million in fraudulent refunds. For an ID theft case to be accepted for investigation it must meet this selective criteria:

- Victim has tax liability with IRS
- Credit history affected – caused foreclosure or declared bankruptcy
- Criminal record under victim’s name
- And/or IRS employee involved in ID Theft

The IRS has released additional ID Theft guidance and it is available at the IRS website by searching PMTA-2012-05 - Disclosure Issues Related to Identity Theft. A few other notes from the IRS functions:

- Most reported limited hiring or no hiring
- District council stated some cases are moving to Denver to cover shortages here.
- Examinations will be auditing more partnerships and business returns in fiscal 2013

Last Arizona Department of Revenue is starting to engage collection agencies. 10,000 notices have already gone out to taxpayers, stating if payment is not received in 30 days their case will be referred to a collection agency.

The next liaison meeting will be held in January 17, 2013. If you have a systemic problem with the IRS that you wish to have brought up, please email Andrew Mark at andrew@ajmarkcpa.com.

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2 Logos to Choose From!

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bit.ly/AZNATPAApparel
ARIZONA CHAPTER—NATP
ANNUAL CONFERENCE AND MEETING
Thursday, September 20, 2012 and
Friday, September 21, 2012

Join us for up to 15 CPE, which includes these current topics:
- Identify Fraudulent Documents, presented by the specialists from
  Immigration and Customs Enforcement (I.C.E.) Department of Homeland
  Security, an amusing 2 hours of Ethics, the new rules on Schedule D with
  form 8949, and an update on Arizona Anti-Deficiency Laws; and a special
  8 CPE Friday seminar on "COD In The Real World, part 2" presented by
  Lisa Ihm, EA., brought back by popular demand. Come and enjoy the
  San Marcos Golf Resort in historic Chandler and unwind with a round of
golf*, delicious meals and networking with your colleagues.

*Courses receive a discounted golf rate ~ please call San Marcos for details.

AZ-NATP ~ AN NATP AWARD WINNING CHAPTER

--SCHEDULE & TOPICS--

UP TO 15 CPE CREDITS AVAILABLE

AGENDA & SPEAKERS (subject to change)

Thursday, September 20, 2012 7:00 AM to 4:40 PM
7:00 AM Sign-In & Hot Breakfast Buffet
Welcome - Sandy Barrett, EA, AZ NATP President, Introduction of 2013 AZ-NATP Board of Directors Candidates
Jo Ann Schoen, E A., NATP Representative
Identifying Fraudulent Documents, Presented by I.C.E. - Immigration & Customs Enforcement, Dept. of Homeland Security
Morning Break - Put your business card in the drawing for AZ-NATP Prizes! You must be present to win!
Ethics, Presented by Samantha Whittle
Lunch & AZ-NATP Annual Meeting and Election
Schedule B Presented by Martha Hamilton
Afternoon Break
New Developments to Arizona Anti-Deficiency Laws/Statutes, Presented by Joseph Veled, Attorney At Law
And the Winners... AZ-NATP "ARIZONA BUCKS"

5:30 PM Networking Time & Cash Bar ~ In the Banquet Room
6:00 PM AZ-NATP Annual Banquet - Dinner is Served
Installation of 2016 Officers by NATP Representative, Jo Ann Schoen, E A.
Charity Auction - Mike Whittle, Auctioneer

Friday, September 21, 2012 7:00 AM to 4:40 PM
7:00 AM Sign-In & Hot Breakfast Buffet
Welcome - Sandy Barrett, EA, AZ NATP President
Cancellation of Debt in the Real World, Part 2: Presented by Lisa Ihm
Morning Break
Arizona’s Children Association - Presentation of Check
Cancellation of Debt in the Real World, Part 2 continued: Presented by Lisa Ihm
Lunch - Let’s Eat!
Cancellation of Debt in the Real World, Part 2 continued: Presented by Lisa Ihm
Afternoon Break
Cancellation of Debt in the Real World, Part 2 continued: Presented by Lisa Ihm
AND THE WINNERS... AZ-NATP "ARIZONA BUCKS", Closing - Turn in Evaluations & Receive CPE Certificates

Disclaimer: The number of hours of Continuing Professional Education is stated for Enrolled Agents, Enrolled Returns, CPAs and other Professionals are responsible for reporting their CPE credit in accordance with the requirements of their regulating or certifying organizations. They may obtain more or less CPE credit depending on their requirements.

Topics, speakers and order of presentations are subject to change. Food presentations are subject to change by venue.
SPEAKERS

Samantha L. Whittle, EA, MEd, has been in tax preparation part-time since 1990 and full-time since 2008. She has been an Enrolled Agent since 2011. She has been teaching at Arizona State University since 2009 and NATP since 2011. Samantha earned her BS degree in Education from Northern Arizona University in 1997 and her MEd in 1999 in Education Administration from Northern Arizona University. She was awarded a lifetime teaching certificate from the State Board of Directors for Community Colleges in Arizona. She has extensive experience teaching mathematics. Samantha has also trained new teachers, new staff members, written curriculum, and trained professional teachers on how to use teaching materials. In the past few years she has turned her focus to teaching ethics for AZ NATP and foster care deductions for nonprofits. Samantha has been a member of NATP for the past four years. At the state level, Samantha has served on the BOD for the past two years. This year she is serving as Secretary. She is also the Chairperson for Public Relations and a member of the Education Committee. Last year she served as the Chairperson for Professional Standards, Public Relations, and Community Betterment.

Marta Hampton, CPA, MBA, owns and operates Expert Tax & Accounting Services LLC, located in Tempe, Arizona. Her company has been providing tax preparation and small business consulting services to over 1,500 clients since 2004 when Marta transitioned to tax practice from a corporate accounting background. She holds dual bachelor's degrees in English and in Accounting as well as a Master's degree in Business Administration. Marta is a member of NATP and the Arizona Society of CPAs. She is also a Certified Legal Document Preparer in the state of Arizona, a designation that enables her to offer expanded business consulting services to her clients.

Joseph A. Velez, Phoenix Real Estate & Business Law Attorney, has represented and advised clients on numerous legal issues in the areas of real estate law, employment law, business law, and bankruptcy. Joseph Velez assists not only regarding human resources issues, such as compliance with the various federal and State of Arizona laws, or dealing with the EEOC, but also helps make sure that his clients are able to avoid expensive litigation, administrative claims, inefficiencies, and distractions. This extends beyond employment issues and includes business law assistance such as matters relating to contracts and disputes, as well as lease and payment issues. He also practices bankruptcy law and assists individuals and businesses with debt management issues.

Lisa Ihm, EA, has taught her Cancellation Of Debt (COD) Seminar to thousands of preparers. It was widely acclaimed as "exceptional." She began teaching seminars about debt forgiveness back in the 1990s when we had the last wave of foreclosures, a small wave compared to this one. Rather than simply reciting the rules, she dug below the surface to determine how they will affect real-life taxpayers, each of whom has a unique and often interesting situation. "You think about how tax laws affect your clients and how you can use those laws to your clients' benefit. Lisa's step-by-step approach and practical worksheets help both beginners and experienced preparers get the answers they need to tackle these complex problems.

NATP NATIONAL VISITOR

JoAnn Schoen, EA, JoAnn Schoen has been a tax professional in Rochester, MN for the past 31 years, owning Accounting & Tax Associates, Inc., since 1984. She has been a member of NATP since 1996, serving as a Minnesota Chapter board member and past president, and on the Chapter Advisory Council as treasurer. Schoen is a graduate of the University of Wisconsin – Madison. She and her husband Bob have two children, and two grandchildren.
ARIZONA SEMINAR-NATP
ANNUAL CONFERENCE
Thursday, September 20th, 2012 7:00am-4:40pm and Friday, September 21st, 2012 7:00am-4:40pm
AZ-NATP ~ AN NATP AWARD WINNING CHAPTER
CROWNE PLAZA~ SAN MARCOS GOLF RESORT
One San Marcos Place Chandler Arizona 85225 1-888-235-5527 or 480-812-0900

Return completed forms with registration fees to:
NATP, PO BOX 8002, APPLETON, WI 54912-8002
Fax 900-747-0001 Call 800-558-3402 x3 On-line: www.naptax.com/chapters/pages/arizonachapter.aspx

PLEASE PRINT
*PLEASE USE A SEPARATE REGISTRATION FORM FOR EACH PERSON

Name/Spouse/Guest - Include Designations(s):
Address: ___________________________ City: ______________ State: _____ Zip: __________
Phone: __________________ Fax: __________________ Email: __________________
Member of NATP? Yes No Ever attended an AZ-NATP Conference? Yes No
NATP Member # ___________ Professional License # ___________ PTIN # ___________

CONFERENCE FEES

<table>
<thead>
<tr>
<th>Full Conference (per person)</th>
<th>*Received @ NATP on or before Sept 14th</th>
<th>*Sept 14th &amp; after Register @ the door</th>
<th>AMOUNT</th>
</tr>
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<tbody>
<tr>
<td>MEMBERS:</td>
<td>$295.00</td>
<td>$345.00</td>
<td>$</td>
</tr>
<tr>
<td>NON MEMBERS:</td>
<td>$345.00</td>
<td>$395.00</td>
<td>$</td>
</tr>
<tr>
<td>Includes 9/20 &amp; 9/21 CPE Sessions, Meals, Coffee, and Thursday Night Banquet</td>
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Only have time for one day?:

**Thursday, September 20, 2012**

MEMBERS: $160.00 $210.00 $360.00
NON MEMBERS: $210.00 $260.00 $500.00
Includes CPE Sessions, Breakfast, AM Break, Lunch, and PM Break

**Thursday Banquet** $45.00 $55.00

**Friday, September 21, 2012**

MEMBERS: $165.00 $215.00 $445.00
NON MEMBERS: $215.00 $265.00 $485.00
Includes CPE Sessions, Breakfast, AM Break, and Lunch

Spouse/Guest Fees (No Education-Individual Meal Only)

| Thursday Breakfast | $24.00 | $34.00 |
| Thursday Lunch | $28.00 | $38.00 |
| Thursday Banquet | $45.00 | $55.00 |
| Friday Breakfast | $24.00 | $34.00 |
| Friday Lunch | $30.00 | $40.00 |

TOTAL AMOUNT $      

PAYMENT OPTIONS:
1) Check made payable to "NATP"
2) Charge to Credit Card #

HOW TO REGISTER:
Mail to: NATP
PO BOX 8002
Appleton, WI 54912-8002
Fax: NATP @ 900-747-0001
Online: www.naptax.com/chapters/pages/arizonachapter.aspx

**** Registrations must be received @ NATP by close of business September 14th, 2012.****
*** After that date, please register at the door.***

Questions? Call Lin LeClair @ 520-329-1041, x13 or NATP 1-800-558-3402, x3 Member Services
All cancellations must be in writing and postmarked on or before September 10th, 2012 for a refund, less a 50.00 processing fee.
NO REFUNDS AFTER SEPTEMBER 10TH, 2012. HOWEVER, CLASS MATERIAL WILL BE EMAILED TO YOU.
**Persons with physical needs or special dietary concerns, please be sure to inform the Hotel/Conference Center.**
WELCOME TO OUR NEW MEMBERS!

JANUARY—JULY 2012

Submitted By: Erica Barber, EA—Member Recognition Chairperson

natperica@gmail.com

Carla Rae Corn
Elizabeth A Goff, CPA
Calvin Lickfelt
Delbert May
Matthew Michael
Theophilus Olu Oriabure
G Lee Pepper, CPA
Tiffany Powell
Lawrence Warner Rust
Fred Kent Snow
Richard Scott Walters
Charles Douglas Werts
Cheryl Ann Young
Xhelal Asllani
G Allen Gugar
Shelley Kurzawski
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Teresa Lomeli
Gregg Michael Millar
Etta Jean Osterloh
Mario Sanchez
Steve Shopo
Gary Wayne Stallings
Edwin C Yazzie
Willie L Yee
Mireyda Leal
Paige Messang
William Reichert
Cathy L Roberts
Lois C Beyer
Elizabeth Duran
Pamela Enos
Rosario Gastelum-Rocha
Debra Kay Hartwick
Stephanie Hays
Paula Dianne Maas
Joseph B Miratsky
Thomas Ray Peale
Roy Martinez Ruiz
Debra Jean Stump
Marion Ann Warsaw
Tina Abney
Shirley Gabriela Adams
Paula K Anthony
Mary Ellen Arndorfer
Jennifer Atkins, EA
Lee James Balin
Anna Marie Barrios
Ana Belmares-Cota
Faith Betancourt
Bipin Bhatt
Lori Borgen
Guy Bowman
Stacie Boyle
June Bradford
Karan Brady
Roger W Brown
Marti Bryant
Denise M Buhler
Robert H Bushelle
Steven Buterbaugh, EA
Charles Ellwood Butler
Elizabeth Callaway, CPA
Colin Scott Campbell
Mary Carey
Mary Catledge
Denise Christophel
Stephanie Denman
Marilyn Desmond
Joanne M Elsa, CPA
Harvey Factor
Carol Farnsworth
Michael J Felman
Linda Jo Felter
Alice Fields
William R Fitzgerald
Richard M Forsatt, CPA
Robert Frame
Joseph Fulton
Joy Garso
Oscar Gonzalez
Raymond Edward Grace, CPA
Kara L Granillo
Billie Green
Stephen Griffin, EA
Donna M Harrington
Kimberly Henderson, EA
Kevin Henry
John Herman
James Hoodenpyle
Jack Hutton
Shelley Ann Irwin
Tammy Kamp
David Keith
Perry Daniel Knaub
Carol Sue Krizan
Jannelle A Ledezma
Greg Leopard
Nancy L Leubner
Dennis Lyon
Patrick Masoya
Deborah McLaughlin
Larry David Miller
Shanendolh Lynn Norris
Mary Denise Phelan-Propst
Bonnie Pinkert
Loretta Ann Rite
Irene Roaro-Jasso
Armando A Rosas
Joe Jamilla Saguad
Donald Schaper
Carey Shaffer
Hina R Shah
Carol Smith, CPA
Debra Spekos
Cheryl Stanislawski, CPA
Barry Strauss
Victoria Lee Stubbs
Mike Ray Suba
Joseph M Tames
Camala Templeton
Mary Ann Thomas, EA
Juan Valenzuela
Cynthia Louise Vance
Amy Wall
Donna Warford
William Webb
Jaime M Weiss, ATP
Dee Dee E Westgate
Zachary Whipple
Nichelle Randolph Williams
Pamela Greninger
Kathleen Mary Klosterman
Jean Loretta Light
Wende Mutschler
Evan Nielsen
Essex Peters
Robert Rendak, CPA
Willie Winfield
Amanda Bakken
Doris Milton
Tina Louise Morrow
John L Nardi, CPA
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David Williams
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Erica@cdtax.com
NATP Member Benefits
NATP strives to bring you success in your business through many member benefits designed for the busy tax professional.

Research Services—Remember to use your annual FREE research answer! Our on-site staff of federal tax specialist answers over 30,000 questions every year on a variety of complex tax issues and will provide supporting documentation at no extra charge. Plus, members get one FREE answer every calendar year and discounted rates on subsequent answers.

Tax Store—Supplies and educational material for the tax professional. The NATP Tax Store is the one-stop shop for your business needs—plus members get a discount!

Here’s just a same of the great items you’ll find:
- Client Folders
- Record Saver Envelopes
- Record Books & Organizers
- Tax Tips Client Newsletter
- Reference Books
- Plus Many More Items!

Publications—Get the latest tax news and updates. We make complex tax issues easy to understand and feature business and practice management information in any of our four publications: TAXPRO Weekly, Chapter Weekly, TAXPRO Monthly Newsletter, and TAXPRO Journal—Yours FREE with membership.

Education—Flexible choices to give you the CPE course you want. Choose from outstanding live workshops, facilities online, self-study, and webinars. Members get discounted rates on all our education.

Representation & Advocacy—Your views are represented. NATP works to protect your right to practice and shares your concerns and views with key IRS personnel and government officials.

NATP Affinity Partners—Group Buying Power! Get great prices on insurance (E&O Business, medical, and personal), credit cards and processing, collections, office supplies, and its always a growing list of partner companies.

Chapters—Another FREE Member Benefit! Not only do you get this great newsletter, but your Chapter also provides you with great networking opportunities, education events, state government representation, and more!

For more information about becoming a member contact Erica Barber at natperica@gmail.com or NATP National office at www.natptax.com or 800-558-3402 ext 3 for more information.
Did You Know??

For Enrolled Agents:

On the Form 2848, Page 2, Declaration of Representative the “Licensing Jurisdiction or Other Licensing Authority” column should reflect:

IRS-OPR

340,000 Need to take the RTRP Exam
By Sharon Lewis, EA
Vice President and Education Chairperson

The IRS Estimates 340,000 tax preparers need to take the RTRP Exam by December 31, 2013. Based on that number, 856 people will need to take the RTRP Exam per day from September 1, 2012 until December 31, 2013. If your livelihood depends on being licensed, DO NOT WAIT!

The current trend reported by the IRS is that preparers are procrastinating. This could mean that the testing centers may not be able to accommodate the number of people needing to take the RTRP Exam during 2013. Both the testing center Prometric and the IRS are estimating that there will be problems toward the end of 2013.

Most testing center locations have 20 to 25 seats available, and schedule various state licensing and college entrance exams. They are not exclusively used by the IRS. Prometric also issues the S.E.E. Exam for EA’s as well as the CPA Exams and the SEC Exams for financial planning. Because Prometric services other vendors, the availability of seating is projected to be scarce towards the end of 2013.