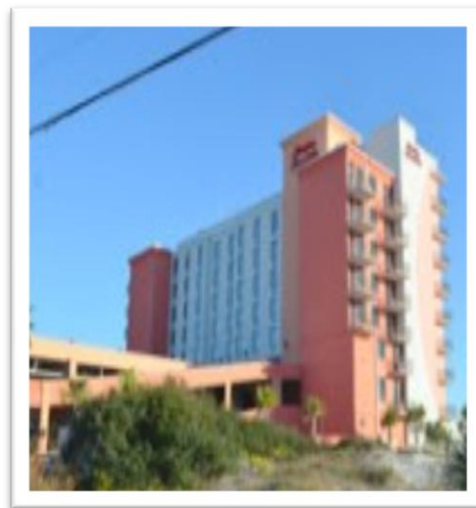
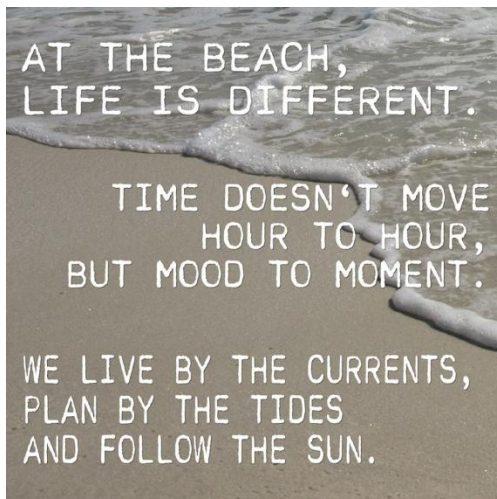




Volume 2; Issue 1
January 2015

JOIN US IN ORANGE BEACH

DON'T MISS SPRING FLING 2015 EARLY BIRD PRICING AVAILABLE

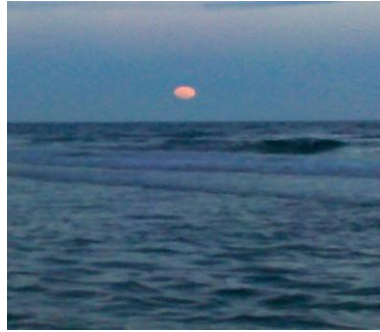


Tax season has just started and if you are like most tax professionals, you are looking forward to the April 15th deadline. So, as you are looking ahead, plan to join your fellow NATP members in Orange Beach for some excellent education and relaxation. Our dates have been set for May 5– May 7, 2015.

Our guest speaker will be Kathryn Keane, EA (View her Bio on page 7) from Brooklyn, NY. She has a wealth of knowledge to share with us.

Don't worry there will be plenty of time to enjoy the beach with your family and friends. We will also have plenty of time to network, so bring your business cards. You will find the registration form enclosed (See page 5). Pay special attention to Our **EARLY – BIRD PRICING**

so you don't miss out on this opportunity. Also, this year if you would like to use a credit card you may call Kathy Hallford at 251-843-5153 to do so by phone. You can view our Approved Agenda on page 6 and course Descriptions pages 7 & 8.



Call Hampton Inn Orange Beach at 251-923-4400 using Group Code: CHXTAX to get group pricing!

Friday & Saturday nights, May 1st & 2nd: Inland: \$159; Sideview: \$169; Beachfront: \$199

Sunday thru Thursday nights, May 3rd to 7th: Inland: \$125; Sideview: \$135; Beachfront: \$159

A MESSAGE FROM YOUR PRESIDENT



The Alabama Chapter has a FANTASTIC “**early bird**” special. We have struggled for ways to make the conferences more affordable to our members and this is YOUR opportunity to cash in. Just remember... it’s called an “**early bird**” special for a reason. You will have time to enjoy the beach or shop or just sit in your room and rest. You may even want to ease on down to FloraBama.

Kathryn Keane will be our guest speaker and she is SOOO excited about coming to speak to our Chapter. The word is spreading rapidly that the Alabama Chapter is on its way up and that our Education Program is FIRST CLASS all the way.

We’ve shuffled the mix a bit to give more free time and to help with expenses. Tuesday and Wednesday lunch will be on your own. There will not be a formal “banquet” as we are accustomed. What we’re going to try is starting the Auction, with our own FAMOUS Miss Nelda at about 11:30 AM with some hearty HorD’oeuvres available during the auction. (I’ve heard that Nelda is even WILDER in the afternoon than in the evening). BRING YOUR MONEY, because, as always, we will have some super things to auction. Doing it this way gives you a free evening. Let us know how you like it.

On a personal note, some of you already know that I have been diagnosed with Stage 3 lung cancer which has spread to my lymph nodes in my trachea. It IS treatable. I have had one surgery to get some extra samples of the lymph nodes in the trachea. I have had tests and more tests and 2nd and 3rd opinions. In late January and during February I will be having radiation and chemo at the same time from UAB. I have a wonderful medical team and a great support system from family and friends like you. E-mail will be the best way to get in touch with me for the next 6 to 8 weeks. But, when I am able to work, I WILL be in the office.

Now, y’all get out there and kick butt... and remember, it’s called “**EARLY BIRD**” for a reason. Everybody HANG IN this tax season. I know it will be difficult but don’t forget that NATP can answer any questions that may be stumping you.

Deborah Lewis, AL NATP President

Education Update!



*Contact Jennifer
Ladner @ Coastal Card
Systems to see if Coastal can
lower your processing fees.
251-7258-3523*

We have approval from National for 2015 Spring Fling Education! Once again you will have the opportunity to get a jump start on your education hours in the best setting possible: the beautiful white sands of Alabama's Gulf Coast!

This year in response to past attendee request we are changing the agenda schedule a little. We will be starting with a full day on Tuesday; followed by two half days. Wednesday we will have three hours of education followed by networking and our Charity Auction with the fabulous Ms. Nelda Bunch! During the networking and auction we will be serving heavy Hors D'oeuvres! Anyone remember those awesome "Shrimp-n-Grits"? Well get ready for some of that and other great hors d'oeuvres!!

In an effort to help our attendees and boost attendance we are offering an "**EARLY BIRD**" special pricing discount of \$199 if paid on or before February 28th!! MAIL YOUR REGISTRATION AND CHECK OR MONEY ORDER TO MS. LORENE! Also you can call or fax my office to pay with Visa, MasterCard or American Express. I have made arrangements for a special terminal to process the AL Chapter credit card payments compliments of Coastal Card Systems (contact Info above). (These funds will not go through my accounts.) After February 28th the price will increase to \$250; and after April 22nd \$275. (NO EXCEPTIONS)

In this newsletter is the bio of our Professional Speaker, Mrs. Kathryn Keane. Many of you will know her from National NATP and the 1040 Updates! Mrs. Kathryn is very excited about coming to Alabama (the beach) she has not been here in years. She has been teaching many years and served on IRS Committees resulting in her ability to bring many years of experience and knowledge to her classes. Also, Mr. Richard Byerly, CPA, AL BOD Member will be presenting a special class on Wednesday morning regarding Social Security.

We will not be doing "Update" per se topics at Spring Fling, as we always seem to need a new "update" on the same subjects by fall conference. So, the education committee has chosen the course topics according to your requests and today's tax world. We will be having several "tax updates" at fall conference.

Lastly, 2015 Fall Conference, which will be our Annual Membership Meeting & Fall Education, is also changing a bit! We have moved the date up to October 26 - 28th, with board & education committee meetings on Sunday evening, and Alabama taxation half day on Wednesday the 28th. We are going back to the Embassy Suites Montgomery - Hotel & Conference Center! (Where we started, I have been told.) Mark the date now and make plans to attend. Watch Chapter Weekly for updates after Spring Fling.

Register now for Spring Fling and take advantage of the "**Early-Bird**" special pricing! Don't forget to make your hotel reservations too! Group Code: CHXTAX - 251-923-4400. As always, don't forget to e-mail or call me with your requests, thoughts and suggestions!

Kathy R Hallford, EA Education Chairman

Alabama Chapter NATP 2015 Spring Fling Education Seminar & Charity Auction

May 5, 6 & 7, 2015

Tuesday 8:00 AM – 4:50 PM

Wednesday 8:00 AM – 1:30 PM

Thursday 8:00 AM – Noon



Hampton Inn & Suites Orange Beach

25518 Perdido Beach Blvd

Orange Beach, AL 36561

Ph (251) 923-4400

www.hamptonorangebeach.com

Group Code: CHXTAX

Name: _____ Member ID# _____

Designation(s): _____ License #: _____ PTIN #: _____

Address: _____

City: _____ State: _____ Zip: _____

Email: _____ Phone: _____

Emergency Contact & Phone Number: _____

Registration Fee	Member Early-Bird, before 2/28/15 ***	Member Standard After 02/28/2015	Non-Members	After 04/22/2015 <u>All Late Registrations</u> Members & Non- Members
2015 Spring Fling	\$199	\$250	\$250	\$275 (Please don't ask for late charge exceptions.)

Wednesday Charity Hors D'oeuvres Luncheon, Guest Ticket \$25

Note: Wednesday's Charity Auction Hors D'oeuvres Luncheon is included with all registrations.

How To Register:

**Mail Checks & Registrations to: AL NATP, c/o Lorene Reed,
PO Box 830244; Tuskegee, AL 36083**

Paying with Visa, MasterCard or American Express; please call Kathy Hallford's office at **Phone:** 251-843-5153 8:30 am to 5:00 pm or **Fax:** 251-843-3712

AFTER FRIDAY, MAY 01, 2015, \$275 AT THE DOOR with Cash or Credit Card

Name as it appears on CC _____

CC #: _____ Exp. Date: _____ Security Code: _____

Signature: _____

Cancellation Policy: To cancel your registration, you must notify AL NATP Treasurer Lorene Reed no later than **April 22, 2015**; to receive a refund less Cancellation fee is \$50.



Alabama Chapter National Association of Tax Professionals
SPRING FLING 2015 EDUCATION SEMINAR
MAY 5, 6, & 7, 2015
Hampton Inn & Suites (On the Beach)
Orange Beach, AL

APPROVED AGENDA
Monday, May 4, 2015

4:00 pm to 5:30 pm Education Committee Meeting, Kathy Hallford, Education Chair
 6:00 pm to 7:30 pm Board of Directors Meeting, Deborah Lewis, President

Tuesday, May 5, 2015

7:30 am to 8:00 am	Registration	
8:00 am to 8:10 am	Welcome & Opening Comments	Deborah Lewis, Chapter President
8:10 am to 9:50 am	Debt Forgiveness, Foreclosures and the Tax Return	Kathryn Keane, EA
9:50 am to 10:10 am	Break	
10:10 am to 11:50 am	Self-Rental Limitations	Kathryn Keane, EA
11:50 am to 1:00 pm	LUNCH	
1:00 pm to 1:10 pm	Welcome & Opening Comments	Deborah Lewis, Chapter President
1:10 pm to 2:50 pm	Education Tax Breaks	Kathryn Keane, EA
2:50 pm to 3:10 pm	Break	
3:10 pm to 4:50 pm	Nuts & Bolts of Charitable Contributions	Kathryn Keane, EA

Wednesday, May 6, 2015

7:45 am to 8:00 am	Registration	
8:00 am to 8:10 am	Welcome & Opening Comments	Deborah Lewis, Chapter President
8:10 am to 9:50 am	Death & Dying	Kathryn Keane, EA
9:50 am to 10:00 am	Short BREAK	
10:00 am to 10:50 am	Social Security, Apply now or Wait?	Richard Byerly, CPA
	Long Break for Networking and time for Caterers to put food out....	
11:30 am to 1:30 pm	Heavy Hors D'oeuvres served during Charity Auction for the Stone Scholarship Fund with Alabama's First Female Champion Auctioneer, Ms. Nelda Bunch.	

Enjoy the rest of the afternoon with your family and friends on the beautiful shores of Orange Beach

Thursday, May 7, 2015

8:00 am to 8:10 am	Welcome & Opening Comments	Deborah Lewis, Chapter President
8:10 am to 9:50 am	Representing Today's Clients	Kathryn Keane, EA
9:50 am to 10:10 am	Break	
10:10 am to 11:50 am	Ethics in Today's Office	Kathryn Keane, EA

Registration & Lodging information go www.natptax.com/Chapters/Pages/AlabamaChapterEducation.aspx

01/21/2015 Edition

Spring Fling Speakers

Kathryn Keane, EA



Kathryn is the principal tax professional at Macánta Corporation, a small family owned tax and related services practice located in Brooklyn, NY, serving over 850 individual clients and 50 businesses. Kathryn served two 3-year terms on the National Board of Directors of NATP. Kathryn was awarded Chapter Person of the Year for 2002 and for 2008 recognizing her volunteer service to the community at large as well as to NATP. Currently the NY NATP Vice President, Kathryn is thrilled to be the Education Chair for the NY Chapter. In addition to serving on the Board of the NY Chapter of NATP, she currently serves as Chair of the IRS Triboro Practitioner Liaison Committee. Kathryn presents for NATP as part of its 1040 Update series, at their National Annual Conference and for NATP Chapters across the country. Kathryn has a B.S. degree from Brooklyn College.

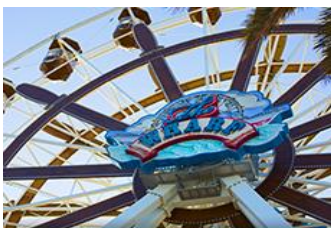
Richard Byerly, CPA



Richard received his bachelor's degree in Accounting in 1982 at the University of Texas at Arlington and earned his CPA in 1989. His experience spreads over a wide range of industries including healthcare, service, retail, manufacturing, production, and entertainment. Richard has over 26 years of experience in the Healthcare Finance industry. He left healthcare to start his own CPA firm in 2010. Richard is currently the President of Healthcare Financial Management Association for the State of Alabama. Richard has lived in Auburn for 23 years with his wife, Kathy. Richard has two children, Justin, who works for him, and Katrina, who studies earthquakes in Australia.



Fishing →



Attractions & Activities →



Golf →

Spring Fling Course Descriptions

1. Death & Dying; 2 hours CPE; IRS #9ZMJ7-T-00053-15-I

When clients die, often the family turns to tax professionals for guidance. This session provides an overview of what is needed to close out the decedent's tax obligation. From determining what is reported on the 1040, whether an estate is required to file an income tax return and when an Estate return is required, this session is a good review tool or a primer on death and taxes.

After this session, attendees should be able to: determine what items are reported on the final 1040; determine when an estate is required to file 1041; establish procedures when working with families of deceased clients; recognize when an estate return (706) is required; and advise a client when filing a Form 706 is advantageous.

2. Self Rental Limitations, 2 hours CPE; IRS #9ZMJ7-T-00054-15-I

Self Rental remains one of the most commonly misunderstood tax issues. This session identifies allowable self rental situations as well as covering the traps clients often encounter. After this session, attendees should be able to: identify self rental property; recognize rent paid in lieu of reasonable compensation; determine the tax treatment of income and loss from Self Rental situations; and advise clients on proper self rental reporting and recordkeeping.

3. Ethics in Today's Office, 2 hours CPE; IRS #9ZMJ7-E-00048-15-1

A comprehensive look at implementing Circular 230 in a real life tax office. After this seminar, attendees should be able to: implement Circular 230 in their offices and in their practical procedures; recognize potential issues; understand preparer penalties; and understand preparer requirements as to due diligence.

4. Representing Today's Clients, 2 hours CPE; IRS #9ZMJ7-T-00049-15-I

A hands-on real life seminar examining the issues facing tax professionals today. From record keeping to reconstruction, case building to appeals. Enabling the tax professional to properly prepare their clients for an audit; be able to recognize when reconstruction of records is a viable option; and understanding the preparer obligations during an audit and how to gather and present records and positions in an examination condition.

5. Nuts and Bolts of Charitable Contributions, 2 hours CPE; IRS #9ZMJ-T-00050-15-I

The new environment at the IRS has brought a new scrutiny of charitable contributions. This session will examine the receipt requirements; the different type of charity limitations (30 % vs. 50%); and the due diligence requirements on the professional tax community. After this the professional will

know how to advise clients on when receipts are required and what types of receipts are acceptable; be able to recognize when AGI limitations on Charitable Contributions apply; properly prepare the Form 8283; and advise clients about record retention.

6. Education Tax Breaks, 2 hours CPE; IRS# 9ZMJ7-T-00051-15-I

As our economy still struggles, financial aid dollars are drying up; more and more clients are carrying more of the financial end of college and other post-secondary education. This session will address all the options available: American Opportunity, Lifetime Learning, Tuition Deduction, and the ever confusing 1099-Q distribution. After this session the tax professional will understand the requirements for claiming the American Opportunity Tax Credit and/or the Lifetime Learning Credit; how to properly calculate the Education Tax Credits; how to recognize and utilize other Education Tax Breaks such as employer provided assistance and US Savings Bond Exclusion; and discuss Education Planning tools such as the Coverdell and Section 529 plans.

7. Debt Forgiveness, Foreclosures, and the Tax Return, 2 hours CPE; IRS # 9ZMJ7-T-00052-15-I

A hands-on approach seminar discussing the 1099 C, 1099 A, and the Form 982. As clients continue to struggle with financial hardship, more are entering into agreements. This seminar will address the many situations our clients find themselves facing. The tax professional will be able to recognize and report cancellation of debt income; gains/losses from repossessions (foreclosures); Understanding and utilizing Form 982; and to recognize and correctly compute when insolvency exists as an option.

8. Social Security: Apply now or Wait, 1 hour CPE; IRS # 9ZMJ7-T-00055-15-I;

This session will address: helping your client plan the right time to sign up for Social Security Benefits; knowing how to guide your clients on the best age to begin drawing social security benefits in today's world; and how to plan for retirement. **Richard Byerly, Instructor**

This will be a total of 15 CPE: 2 CPE Ethics and 13 CPE Federal Taxation



Registered yet??? Hotel Reserved??? Hampton Inn Orange Beach251-923-4400 Group Code: CHXTAX



SCHOLARSHIP OPPORTUNITIES

We raise money at Spring Fling for the Dale Stone Scholarship Foundation. Items are auctioned to the highest bidder and OUR OWN Ms. Nelda gets the auction going. These funds are for you, the members of the Alabama Chapter of NATP. The Scholarship Committee is working on a more flexible program to assist you in your education endeavors so that you can apply for funds to help with tax based college courses, Enrolled Agent classes, Alabama NATP Conferences, and National NATP Conferences. If you are planning on attending the National Conference in New Orleans, you can apply for a stipend of up to \$250.00. You must attend 10 hours of CPE in New Orleans, complete the Chapter application and have proof of class attendance. You can turn these in to Lorene (Treasurer) or Deb (President). The funds will be released after verification of attendance. We can award 10 of these \$250.00 stipends for attendance at National. Education is a key to success and it's certainly primary in the tax business.

A SMALL TIDBIT FROM NATIONAL

According to Steve Schultz, our Chapter Leadership Advisor, as of 12/31/14 the Alabama Chapter of NATP had 211 members. And almost all of them prepare taxes. Steve says that the AL Chapter may include a few retirees but that "number should be close." He also stated that "the national number for the same period preparing taxes is 23,050."



Registered yet??? Hotel Reserved???
Hampton Inn Orange Beach 251-923-4400
Group Code: CHXTAX



This could be you!!!

2015 ALABAMA BOARD OF DIRECTORS

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Gwendolyn Harris-Brooks	gharris1@knology.net	334-644-3581
Richard Byerly	byerlycpa@gmail.com	334-740-7037
Malcolm Hall	hall2006@inbox.com	334-356-0788
Kathy R Hallford	Kathystax@millry.net	251-843-5153
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