



CONNECTICUT CHAPTER NEWSLETTER MAY, 2015

President's Comments

by Bill Van Hall, EA

The tax season was interesting as always and lots of different issues came about. If the issue was not the Affordable Care Act (ACA) this year, it was Identity Theft or it was lack of IRS availability. After getting through all of these new issues, then it was the same as it in the past - it was software program problems or clients who did not bring all of their documents and in some cases did not tell you about the missing documents until they came to pick up their returns.

We have a lot going on this season. First, we will have our June Seminar and then we will again have our November Seminar. See the details of our June Seminar in our June Seminar Column. Our June Seminar will be with Sue Voth, EA. We have had Sue at our seminars in the past and have good turn out because Sue is very knowledgeable and has presented on some great subjects

This year the National Convention will be held in New Orleans and will offer 28 CPE, more than you will probably need. The first item I see on the seminar schedule is the ACA. I think this topic is going to grow into a very significant item for our client tax returns. By now you should have received your 2015 Live Education booklet that covers the convention along with a number of other education programs that are available from NATP. If not, you can get details on the NATP website www.natptax.com.

The convention dates are July 20-23 at the Hilton New Orleans Riverside located in the French Quarter. I know a lot of people are very happy with this location, including my wife, and room rates of \$149 should be very attractive.

We will again have a luncheon on Tuesday for all Connecticut attendees and spouses. In the past Diane Andrews has handled the luncheon, and this year Linda Hartmann has volunteered to pick up this responsibility. We will post the time and location on one of the bulletin boards at National on the first day of the convention.

We will also have the Chapter Showcase Tuesday evening and I personally will try to handle that event. If anyone is interested in taking on this annual responsibility, please contact me to learn what is involved.

I am still part of the DRS Commissioner Advisory Panel. This panel meets quarterly with the Commissioner and some of his staff. At these meetings there are discussions of plans that the IRS has and questions and concerns from the non staff panel. I will again include a sheet in our June pass outs for you to provide me with any issues or questions you may have with the Connecticut DRS. However, they cannot try to resolve individual tax problems.

The IRS has a similar quarterly meeting with our liaison group. The same processes are covered at these meetings,

For either of these meetings you can provide me with issues or improvements you would like to have considered by either DRS or IRS and I will present them at these sessions. If you have any questions regarding our Connecticut Chapter or NATP or suggestions for improving our Chapter, feel free to call me at 203-798-9528 or email William_van_hall@SBCGlobal.net.

As always we are always looking for people to become board members and eventually board officers. If you are interested see me at the June Seminar.

At the most recent meeting with DRS we discussed that the State of Connecticut and DRS are working to make changes to the web sites. What is planned for early next year is that all individual department web site locations will be eliminated; all access to state department web sites will be through the State of Connecticut web site. They think that this will make it easier for users to access various departments. However, each Department will still be responsible for maintaining their portion of the web site.

If you have any questions regarding the Connecticut Chapter of NATP or have any suggestions for improving our Chapter feel free to call me at 203-798-9528 or email me at William_Van_Hall@SBCGlobal.net.

Note: remember that once you join the National NATP organization, you also automatically become a member of the Connecticut Chapter of NATP. **The state chapter membership is included in the annual dues you pay to the national NATP organization.**

CT Chapter New Members

by Rosemarie Esposito, EA

The most recent membership statistics show:

- NATP members to date – 22803
- CT NATP members to date - 481

Welcome to the Connecticut Chapter of the National Association of Tax Professionals. We hope to see you at our two annual seminars that are held in June and November. We have professional speakers covering ethics, tax law, and tax law changes. We also have speakers from the IRS.

These seminars also allow you to meet other Connecticut tax professionals with whom you can interface to get new ideas and create new friendships. These people have joined NATP since our last newsletter publication:

Third Quarter 2014 - 16

Lynden John Anderson – New Canaan
Lucas Carroll – Portland
Carol Mims-Carter – New Haven
Pamela Cartier – Fairfield
Mark Errico – Norwalk
Alexander Gazis - Enfield
Sylvia Greenfield – East Haven
Asha Jain – Easton
Jason Leanard – Naugatuck
Anna Manzi – Groton
Angela Negron – Stamford
John Post – South Windsor
Emmett Ryan – Norwalk
Joseph Schofield – West Haven
James Vilasuso – Manchester
Richard Zablocki – New London

4th Quarter 2014 - 25

Patricia Ainzuaín – Wethersfield
Ganimedes Barrera – Stamford
Eleny Benitez – New Milford
Henry Bystryk – Naugatuck
Marie Dupree – Brookfield
Julio Gonzales – Norwalk
Jill Grieveson – South Glastonbury
Steven Hintz – South Windsor
Robie Irizarry – New Britain
Laura King – Somers
Cynthia Kramer – Avon
Marcela Millan Martinez – Norwalk
Donald Mazas – Wolcott
Susan McAteer – Fairfield
Patrick McGannon – Trumbull
Sharon Moorner – Norwalk
Judith Olsen – South Windsor
Joe Orabona – Windsor
Karen Ormsbee – Norwalk
Machado Javier Ortiz – Greenwich
Richard Allen Quinn – Stratford
Carolyn Rablen – Norwich
Prince Scott – Bridgeport
James Stavris – Wallingford
George Wood – Groton

First Quarter 2015 – 6

Judith MacDougall Blair – Groton
Anna Filomena Denninger – Danbury
James A Dunn – Westport
Richard J Huber – Fairfield
Laur-Al Kendall – West Haven
Bryan Meek - Norwalk

Vendors

by John Littel

CT-NATP is accepting a limited number of vendors for our Spring or Fall conferences held in Cromwell.

The cost is \$200/Table. If you have a vendor who may be interested have them call John Littel at (203) 481-0468.

Newsletter Submissions

If you would like to submit anything for the next CT Chapter newsletter, e-mail your information to gparch1@aol.com.

DRS suggestions on Identity Theft

If a taxpayer believes that their CT refund has been stolen:

- They should contact DRS at 1-855-842-1441 and report the details of the incident
- DRS will review to determine if a criminal investigation is feasible
- If a criminal investigation is conducted, the taxpayer will be contacted by DRS

Also, in cases of identity theft, DRS recommends that taxpayers report the incident to:

- their local police department
- Create an Identity Theft report with a police report
- The IRS with an identity theft affidavit
- The Federal Trade Commission

And consider acquiring identity protection

1. Place a fraud alert on your credit file
2. Check credit report

Here are some related links that may be helpful:

<http://www.ct.gov/drs/cwp/view.asp?a=1462&q=517460>

<http://www.consumer.ftc.gov/features/feature-0014-identity-theft>

<http://www.consumer.ftc.gov/articles/pdf-0009-taking-charge.pdf>



**APPROVED
CONTINUING EDUCATION
PROVIDER**

Education Committee

By Bill Van Hall, EA

The CT NATP Education Committee is very excited about the Chapter's upcoming Fall Conference to be held Friday, June 12, 2015 at the Crowne Plaza Hotel in Cromwell.

Our Education Committee has once again done a great job for the June Seminar that will be held at the Crown Plaza in Cromwell, CT on June 12, 2015.

Our speakers will be Sue Voth, EA and Joe McCarthy IRS Liaison.

Sue will cover:

- Social Security Planning,
- IRS Audits,
- Preparing the Final 1040 and 1041's and
- an update on the Affordable Care Act.

Joe will update us on Identity Theft issues.

Both the Affordable Care Act and Identity Theft are subjects that I think we have all been involved with during this past filing season.

Our session starts at 7:30AM with Registration and Continental breakfast, and our seminar will begin at 8:00AM and end at 4:30PM.

Lunch and networking will be included.

Door prizes, including one free conference ticket, will be done at the end of the seminar. Winners of all door prizes must be present to win.

Looking forward to seeing you at our June Seminar.

You can view the agenda and full course descriptions in NATP's Chapter News and on the CT NATP web page.

Flyers/registration forms were mailed out to all NATP members residing in CT as well as to other CT contacts NATP has address information on. A Flyer/registration form is also available on CT NATP's web page.

Questions can be directed to Kris at KRoberts@TheRobertsTaxGroup.com or call (860) 283-4847.

IRS Issues

by Joe McCarthy, IRS Stakeholder Liaison

Before the filing season quickly becomes a faded memory, please take a few moments to help point out any problems you encountered this year in hopes of making next year's filing season go a bit smoother. If you encountered any systemic issues during the filing season please let me know about them. (Unfortunately, I can't handle account related problems.) While I can't guarantee that I will be able to quickly resolve every systemic issue brought to my attention, I will promise to respond to and follow up on all issues raised. If issues need to be referred to a higher level for resolution, I will input the issues into the IRS Issue Management Resolution System (IMRS). If an issue cannot be resolved, I will let you know that it can't be resolved along with the reason why it can't be resolved.

However, moving issues forward might be a bit more challenging than it has been in the past due to budget and personnel issues, etc. so it might take longer to resolve the issues you raise. In addition, the IRS is always looking for ways to improve and one of the best ways of doing this is by having experienced tax practitioners provide the IRS with suggestions for improvement. So if you have any suggestions to improve next year's filing season or suggestions on how to improve the IRS in general please send them my way. I will see that they get forwarded to the appropriate IRS personnel.

Also if you have raised any issues in the past that I have not gotten back to you on, please contact me. On rare occasions things do fall through the cracks. Lastly you do not have to wait for my annual filing season wrap up letter in order to point out systemic issues or make suggestions for improvement. You are welcome to contact me at any time during the year at (203) 415-1015 or joseph.s.mccarthy@irs.gov.

Reminder: Teachers Retirement CT tax break starting in 2015

by Rosemarie Esposito, EA

Your retired teachers will be very happy that CT has decided to give them a tax break starting this year!

In determining the Connecticut adjusted gross income, a taxpayer is allowed to subtract from his or her federal gross income the following percentage of the pension received from the Connecticut teacher's retirement system, provided such pension is properly includible in gross income for federal income tax purposes:

For taxable year beginning:

- January 1, 2015: 10%
- January 1, 2016: 25%
- January 1, 2017 and each taxable year thereafter: 50%

See Special Notice 2014(5), Legislative Changes Affecting the Income Tax