

August 2015

NY NATP E-News



NEW YORK
THE FIRST CHAPTER

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NY NATP
1129 Front Street
Binghamton NY
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Christina Parisi
Newsletter Editor

NATP's Chapter Person of the Year:

Kathryn M. Keane, EA

NY NATP Vice President and Education Chair

Kathryn is the **FIRST NATP member** to receive the C.P.O.Y. award **THREE (3) TIMES!**

For some years now Kathryn and I have often talked about how the two of us have won this Chapter Person of the Year award twice. We would get all puffed up about it and do a lot of bragging. What are we going to do now? She's one up on me.

-Wendy Loomis

Congratulations to Kathryn Keane on being chosen as the Chapter Person of the Year for an unprecedented third time. During the many years I have served on the NATP New York Chapter Board of Directors with Kathryn her hard work, insightfulness and genuine concern for the chapter has never waived and will always be an important part of its foundation. When they build the NATP Hall of Fame, Kathryn Keane will deservedly be one of the first inductees.

-Rick Rottkamp



President's Message

It was wonderful seeing so many of you in New Orleans at the NATP National Conference. The Conference was a great success. I thoroughly enjoyed the opportunities to meet with the NY NATP members during breaks and at the various functions.

Thank you to all of the members who helped with the Chapter Showcase and contributed to the success of the annual charity event. There is tremendous strength in numbers and I am so thankful to be associated with this group of dedicated professionals.

Our Fall Seminar Series is rapidly approaching and I strongly encourage you to attend as these sessions are full of great education. I look forward meeting many of you as I travel around the state this fall.

Warmest Regards,

Nick Kounios, EA

Payments to Survivors & Victims of Terrorist Attacks

Victims and survivors of the terrorist attacks on our nation have received various payments over the years from a variety of sources. This module looks at recently enhanced and clarified instructions from the Internal Revenue Service impacts those payments.

Disability Payments as a Direct Result of Terrorist Attacks

Taxpayers may receive payments of disability benefits, including Social Security Disability, arising from injuries incurred as a direct result of a terrorist attack directed against the United States or its allies. These payments maybe excludable under certain conditions. Terrorist attacks include the September 11 attacks, Oklahoma City attack and the anthrax attacks.

When calculating the excludable portion, be careful not to include those payments the taxpayer would have been entitled to had they not become disabled.

Example: John, a first responder, was disabled as a direct result of the September 11 attacks. At age 54, he began to receive Social Security Disability Insurance. The payments John receives, until he reaches his full retirement age of 66, are eligible to be excluded from tax on his federal and NYS tax return.

How do we proceed from here?

Ideally, if a taxpayer is receiving these disability benefits, tax professionals should encourage the taxpayer to contact the payer to correct the reporting documents. Corrected Form 1099-R or Form W-2 should be issued removing the amount attributable to the disability arising as a direct result of the terrorist attacks. Form W-2 should reflect the non-taxable amount in Box 12 as Code J (non-taxable sick pay). Form 1099-R should reflect the gross amount paid in Box 1 and only the non-disability amounts, if any, in Box 2.

Previously filed returns can be amended to exclude the disability payments received due to a disability as a direct result of the terrorist attacks. Attach copies of the corrected Form W-2 and Form 1099-R. Also, note "Publication 3920" and "Section 104 (a) (5)" across top of the Form 1040-X and in explanation section. Observe the same notations for the New York State return (IT 201-X or IT 203-X).

Death Benefits

Death Benefits paid on behalf of an employee who died as a result of the terrorist attacks are excludable. However, only the amount exceeding the usual death benefit paid by the employer is excludable under these provisions. The exclusion does apply to incidental death benefits paid under a qualified retirement plan even if these amounts would have been paid had the death had occurred for a reason other than a terrorist attack, including the anthrax attacks.

Continued...

Payments to Survivors & Victims of Terrorist Attacks

Continued...

Tax Forgiveness for Victims of Terrorism

The federal tax liabilities of decedents who died as a result of wounds or injury, including illnesses and diseases, sustained in the Oklahoma City or September 11th attacks. The forgiveness is also available for decedents who died as a result of illness incurred as a result of the anthrax attacks. The tax forgiveness is available to those working in the recovery or rescue efforts who later died as a result of illnesses or injuries incurred in those efforts.

While the tax forgiveness is issued for years beginning with the injury or event and ending on the year of death, the actual availability of a refund is limited by the usual statute of limitations.

Minimum Amount of Relief is \$10,000. If a impacted taxpayer total tax forgiveness is less than \$10,000, the difference between \$ 10,000 and the actual tax forgiveness is treated as a tax payment for the decedent's final tax year. The IRS will refund the difference if filed timely.

Example: A child wounded in the September 11th attacks died in TY 2012 as a result of those wounds. The child never had any income tax liability. The child qualifies for the minimum relief of \$ 10,000. The amount is treated as a tax payment on the child's TY 2012 tax return, if filed before April 15, 2016.




While school might be out for summer, we are STILL collecting Box Tops!

Keep an eye out for Box Tops while you shop for Back to school supplies!

Box Tops can be mailed to 2109 Homecrest Ave, Brooklyn NY 11229.
We are also accepting nominations for schools in need. Email nominations to info@macanta.com!

For a list of products that contain Box Tops visit: <http://www.boxtops4education.com/participating-products>



Will you be at the
NATP Tax Forum
in Philadelphia?

The NATP Tax Forum will be held September 3-4, 2015 at the Marriott Downtown Philadelphia, PA.

Make sure you stop by and say hello at the NY Chapter booth while you're in the Expo Hall!

The NY Chapter's booth will have information on our upcoming seminars and you will get a chance to meet a few of the people who work so diligently to bring you all these exciting programs!

It's not too late to register for the Las Vegas or Philadelphia Tax Forums!

Use code **NYFORUM** and get the **ultra-low event price** of \$149 for members or \$159 for nonmembers.

For information and to register, call Member Services at 800.558.3402, ext. 3 or visit

http://www.natptax.com/EventsAndEducation/Conferences/TaxForums/Pages/default.aspx?utm_source=ch&utm_medium=email&utm_content=080415&utm_campaign=cn

Did you know?

NYS recently changed their bank accounts and if you (or your client) authorize the NYS Tax Department to deduct payments from a bank account and there is a **debit block** on that account you will need to contact your bank to avoid missing payments!

Contact your bank to **add** NYS' new company IDs and names to the bank account. Do **not** remove the old company IDs! Add the new information for **each** type of payment you make. Each payment type, including unemployment insurance, has its own company ID and name.

See the NYS DTF website for more details: www.tax.ny.gov/pay/all/debit.htm

Upcoming Fall Series!

The Essential Annual Seminar topics include:

The A List: Itemized Deductions: Many of our clients itemize deductions on their income tax returns so it should logically follow that it's an easy form for tax professionals to prepare. Unfortunately, that is not always the case. This session will provide a review of the Schedule A items that are often deducted in error, misunderstood or sometimes missed altogether. (2 CE Cir 230 Preparers)

Schedule D: This course is designed to help tax professionals gain basic knowledge and an understanding of Form 8949: Sales and Other Dispositions of Capital Assets, and Schedule D (Form 1040): Capital Gains and Losses, for individual taxpayers. It starts with basis and the disposition of a capital asset. Then it covers the tax treatment of capital gains and losses, including the net investment income tax and the §121 exclusion for gain on the sale of a principal residence. (2 CE Cir 230 Preparers)

Tax Season Issues: This session will cover many of the problems we all ran into during tax season. If you learn half as much as we did in preparing for this fast moving information packed seminar you will leave happy! (2 CE Cir 230 Preparers)

NYS Update: This session focuses on the latest from Albany including any new tax legislation, advisories and memos and addresses any current changes and trends in New York State tax law. (No federal CEs offered for this portion 1 Credits for NYS CPAs.)

NYS DTF: A representative from the NYS Department of Taxation and Finance will discuss recent issues facing NYS. (No federal CEs offered for this portion 1 Credits for NYS CPAs.)

The Comprehensive IT201/203:

This is the seventh year for this popular course. Materials are updated to current law. This is the perfect course for office staff, new preparers or experienced preparers wanting a complete review of the New York personal income tax return. Learn what your software program doesn't do for you! (No federal CEs offered for this portion 8 Credits for NYS CPAs.)



NY NATP is going green!
Fall Series textbooks are delivered electronically. If you prefer to receive a printed textbook, there is an additional charge of \$20 per textbook.

The NY Chapter's Fall Series begins October 19th!

Keep any eye out in Chapter News, The NY Chapter Discussion board, Chapter Announcements and on our Facebook page for more information as detail are finalized!

October 19-20- Hauppauge
 October 21-22- Fishkill
 October 23- Binghamton {Annual Meeting}
 October 28- Rochester
 Nov 30- Dec 1- Latham/Albany
 December 3- Staten Island

October 20-Queensbury/Glens Falls
 October 21-22- NYC
 October 26-27- Turningstone
 October 29-30- Buffalo
 December 2-Middletown
 December 4-5- Carle Place

Special Event: Saturday, October 24th

Due to the popularity of our Summer Series we decided to offer a one day only encore of the NYS Business Tax Seminar in Owego NY! See the NY Chapter Education page for more information!

NYS Business Tax Seminar: Sales Tax & NYS Corporation Tax Issues

This comprehensive seminar looks at the ins and outs of Sales Tax, the largest revenue base in the State's tax bag. From registration to audits to recordkeeping requirements to industry specific issues (contractors, manufacturers and more), the Sales Tax module will leave no question unanswered. NYS Corporation Tax Issues will include a one hour Panel Discussion on Corporation Problem Solving as well as a three hour module addressing the State specific issues for corporations and other businesses, such as forming/dissolving, NYS tax bases such as capital base, problems that occur when dealing with NYS Agency's other than DTF, as well as many other State issues. Level: Basic. This class qualifies for eight (8) CE for NYS CPAs Sponsor #592.



NY Chapter Annual Meeting

Binghamton, NY
 October 23, 2015!

Keynote Speaker:
 DTF Commissioner
 Jerry Boone!

Do you want to be an Enrolled Agent?

Have you been considering taking the EA Exam?

The NY Chapter has you covered!

This three (3) day hands on course is designed to help you prepare for and pass all three (3) parts of the Special Enrollment Examination (SEE). The information in this course is referenced to the Internal Revenue Code as amended through December 31, 2014, and is applicable for those taking the exam between May 1, 2015 and February 28, 2016.

With three instructors, attendees can expect hands on, personalized attention. In addition, After Day One and Two, there will be a one hour "Ask the Instructor" period

Rockville Centre

Wednesday-Friday, September 16-18, 2015

8 AM—4:30 PM

Best Western Mill River Manor

173 Sunrise Highway

Rockville Centre, N.Y. 11570

516-678-1300

Room price is \$129.00.

Room block ID is NATP.

Call by August 15th 2015 to insure room rate.

Instructors: Raj Prashad, EA, CFP®, George Powers, EA & Nick Kounios, EA

Early Bird Expires: September 2nd

Cicero (Syracuse Area)

Wednesday-Friday, September 23-25, 2015

8 AM—4:30 PM

Comfort Suites Conference Center

5875 Carmanica Drive

Cicero, N.Y. 13039

315-752-0150

Room price is \$109.00.

Room block ID is NY Chapter NATP

Call by August 22nd 2015 to insure room rate.

Instructors: Raj Prashad, EA, CFP®, George Powers, EA & Nick Kounios, EA

Early Bird Expires: September 9th

Did you know? Enrolled Agents are exempt from:

- ❖ NYS Preparer Registration Requirements
- ❖ NYS Education Requirements
- ❖ Annual Filing Season Program Requirements

Special Offer for EA Exam Review Course ONLY: Printed Textbooks are included in the price of this course! See registration form and the end of the newsletter for more information on pricing!

This class qualifies for ten (10) CE for Circular 230 Preparers! IRS Program#SC1N9-P-00021-15-I
See the NY Chapter Education Page for more details!

NY Chapter of NATP

1129 Front Street
Binghamton NY 13905
800-822-3260
607-723-1022 Fax

PHONE:
800-822-3260

FAX:
607-723-1022

E-MAIL:
nynatpstateoffice@att.net

**NY Chapter
Founders Award
Past Winners**

Ralph Sommers
2013

Wendy C. Loomis
2014

We're on FaceBook!
Search for NY NATP!



Is there something you want to see in this newsletter?

Let us know!

We are always looking for fresh ideas and new articles for our newsletter. Please email info@macanta.com or Fax (718) 998-3156 with any suggestions!

Purchasing a Quickfinder?

Will you be buying a Quickfinder for the coming season? We all use these guides and the New York Chapter receives a donation for each book ordered when you use the **Association Code** below or **Special Order Form** provided at the end of this module.

Quickfinder Association Code Q680

The NY Chapter THANKS YOU FOR YOUR SUPPORT!!

2015 Fall NY Chapter NATP Seminar Dates and Locations

<i>Essential Annual Seminar Dates and locations...</i>		<i>Comprehensive IT-201 Dates and locations...</i>	
Mon, 10/19	Eastern LI UPSKY Long Island Hotel (631) 231-1100 110 Motor Pkwy, Hauppauge, NY 11788	Tues, 10/20	Eastern LI UPSKY Long Island Hotel (631) 231-1100 110 Motor Pkwy, Hauppauge, NY 11788
Tues, 10/20	Queensbury Ramada Glens Falls (518) 793-7701 1 Abby Lane, Queensbury, NY 12804	Thurs, 10/22	Fishkill Hyatt House (845) 897-5757 100 Westgate Bus Ctr. Dr, Fishkill, NY 12524
Wed, 10/21	Fishkill Hyatt House (845) 897-5757 100 Westgate Bus Ctr Dr, Fishkill, NY 12524 Instructors: Kathryn Keane, EA, Mick Novick, EA, Esq.	Thurs, 10/22	New York City Holiday Inn Midtown (212) 581-8100 440 W 57 th St, New York, NY 10019
Wed, 10/21	New York City Holiday Inn Midtown (212) 581-8100 440 W 57 th St, New York, NY 10019	Tues, 10/27	Syracuse Turning Stone Resort Casino (800) 771-7711 5218 Patrick Rd, Verona, NY 13478
Fri, 10/23	Binghamton Doubletree Hotel (607) 772-7575 225 Water St, Binghamton, NY 13901 <i>Annual Meeting at lunch with NYS DTF Commissioner</i>	Fri. 10/30	Buffalo Hilton Garden Inn Buffalo Airport 716-932-2727 4201 Genesee St, Buffalo, NY 14225
Mon, 10/26	Syracuse Turning Stone Resort Casino (800) 771-7711 5218 Patrick Rd, Verona, NY 13478	Tues, 12/1	Albany Century House (518) 785-0931 997 New Loudon Rd, Latham, NY 12110
Wed, 10/28	Rochester Holiday Inn Rochester Airport (585) 328-6000 911 Brooks Ave, Rochester, NY 14624	Thurs, 12/3	Staten Island Hampton Inn Staten Island (718)-477-1600 1120 South Ave, Staten Island, NY 10314
Thurs, 10/29	Buffalo Hilton Garden Inn Buffalo Airport (716) 932-2727 4201 Genesee St, Buffalo, NY 14225	Sat, 12/5	Western LI-Carle Place Holiday Inn Westbury (516) 997-5000 369 Old Country Rd, Carle Place, NY 11514
Mon, 11/30	Albany Century House (518) 785-0931 997 New Loudon Rd, Latham, NY 12110	<i>NYS Business Tax Seminar Encore addition-One day only</i>	
Wed, 12/2	Middletown Holiday Inn Middletown (845) 692-4900 68 Crystal Run Rd, Middletown, NY 10941	Sat, 10/24	Owego Owego Treadway Inn (607) 687-4500 1100 NY Rt 17C, Owego, NY 13287
Fri, 12/4	Western LI-Carle Place Holiday Inn Westbury (516) 997-5000 369 Old Country Rd, Carle Place, NY 11514	<i>Annual Meeting: Fri 10/23 Binghamton Chapter Annual Meeting held at lunchtime. Special Guest: Jerry Boone, Commissioner - NYS DTF</i>	

Essential Annual Seminar topics include...

- **The A List-Itemized Deductions:** This session will provide a review of the Schedule A items that are often deducted in error, misunderstood or sometimes missed altogether. (2 CE Cir. 230 preparers)
- **Introduction to Schedule D:** This course is designed to help tax professionals gain a better understanding of Form 8949: Sales and Other Dispositions of Capital Assets, and Schedule D (Form 1040): Capital Gains and Losses, for individual taxpayers. (2 CE Cir.230 preparers)
- **Tax Season Issues:** This session will cover many of the problems we all ran into during tax season. If you learn half as much as we did in preparing for this fast moving information packed seminar you will leave happy. (2 CE Cir 230 preparers)
- **NYS Update:** This session focuses on the latest from Albany including any new tax legislation, advisories and memos and addresses any recent changes and trends in New York State tax law. (No federal CE)
- **NYS DTF:** A representative from the NYS Department of Taxation and Finance will discuss recent issues facing NYS. (No federal CE; 1 CE for NYS)

The Comprehensive IT-201/203 ...

This is the perfect course for office staff, new preparers or experienced preparers wanting a complete review of the New York personal income tax return. Learn what your software program doesn't do for you!

REGISTRATION FORM
Seminar Pricing – Includes Lunch:

(Price does not include printed text)	Essential Annual Seminar	IT-201/203	NYS Business (Owego only)
Member early bird price ó 2 weeks prior to seminar	185	170	200
Non Member early bird price ó 2 weeks prior to seminar	225	170	220
Member after early bird ó within 2 weeks of seminar	200	195	225
Non Member after early bird ó within 2 weeks of seminar	250	195	245

Annual Meeting: Fri 10/23/14 Binghamton

Our Chapter Annual Meeting will be held at lunchtime with special guest and keynote speaker:
Jerry Boone, Commissioner, New York State Department of Taxation and Finance

NY NATP has gone green! Textbooks will be available electronically with no extra charge.

There is an additional charge of \$20 for each printed copy.

- **Lunch provided at all seminars...see below for special dietary needs.**
- **All topics will explore applicable NYS tax relevance**

CE Breakdown:

Essential Annual Seminar: 6 CE Circ. 230 preparers/8 CE NYS CPAs

The A List: SC1N9-T-00024-15-I (2 CE ó Federal Taxation)

Introduction to Schedule D: SC1N9-T-00025-15-I (2 CE-Federal Taxation)

Tax Season Issues: SC1N9-T-00026-I-15 (2 CE-Federal Taxation)

NYS Update

NYS DTF ó (1 CE NYS)

NYS Business Tax Seminar:

0 CE-Circular 230 preparers

8 CE-NYS CPAs **Sponsor #592**

Comprehensive IT-201/203:

0 CE-Circular 230 preparers; 8 CE ó NYS CPAs **Sponsor # 592**

NATP Member? Yes / No Member # _____ PTIN _____

Designation: EA CPA CFP Other _____

Name: _____ Company Name: _____

Street: _____ City, State, Zip: _____

Email: _____ Phone: _____

Seminar(s) Attending (Check selection and fill-in location)

____ Essential Annual Seminar date/location: _____ Fee: \$ _____ Printed book: \$ _____

____ Comprehensive IT-201 date/location: _____ Fee: \$ _____ Printed book: \$ _____

____ NYS Business Tax Seminar: **Sat, 10/24-Owego, NY** Fee: \$ _____ Printed book: \$ _____

Attending 2 days? Subtract \$10: _____

Attending 3 days? Subtract \$20: _____

TOTAL DUE: \$ _____

PAYMENT: Check Enclosed/VISA/MasterCard/AMEX (Discover not accepted)

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Special Dietary Needs? Please circle if applicable: Kosher Vegetarian Halal

Refund Policy: NY NATP will retain a \$25 administrative fee for cancellation prior to 7 days of seminar.
NO REFUND will be given for cancellations within 7 days of seminar.

Mail or Fax this page to: NY Chapter NATP, 1129 Front Street, Binghamton, NY 13905 * Fax: 607-723-1022

Registration 7:30 am * Seminar 8am ó 5pm * Lunch provided at all Seminars *

Questions: nynatpstateoffice@att.net or Phone: 607-772-2000

EA Exam Review Course Registration Form

To register: fax the below to 607-723-1022, for more information, call 607-772-2000

Name:		Member #	PTIN:
Address:			
City, State, ZIP:			
Phone:		Email:	
Credit Card Information:			
Name on Card:			
Card Number			
CCV:	Exp:	Billing Zip	
Special Dietary Needs: Kosher Vegetarian Halal			

Lunch Included with all seminars! Printed text is complementary for this seminar ONLY!

Early Bird Registration: \$700 for NATP Members, \$750 for non-members

Registration less than 14 days before seminar: \$ 745 members, \$795 for non-members.

Please select your course:

ROCKVILLE CENTRE: Wednesday-Friday, September 16-18, 2015 8 AM—4:30 PM Best Western Mill River Manor, 173 Sunrise Highway, Rockville Centre, N.Y. 11570 516-678-1300	
CICERO: Wednesday-Friday, September 23-25, 2015 8 AM—4:30 PM Comfort Suites Conference Center, 5875 Carmenica Drive, Cicero, N.Y. 13039 315-752-0150	

Refund Policy: NYNATP will retain a \$25 administrative fee for cancellation prior to 7 days of seminar.
NO REFUND will be given for cancellations within 7 days of seminar.

Want to know more? A full list of Objectives for the EA Exam Review Course is available at: <http://www.natptax.com/Chapters/Pages/NewYorkChapterEducation.aspx>

This class qualifies for ten (10) CE for Circular 230 Preparers!

Mail to: NY Chapter NATP, 1129 Front Street, Binghamton, NY 13905 or Fax to: 607-723-1022

Registration 7:30 am * All seminars 8am – 4:30pm * Lunch Provided (see above for special needs)

Questions: nynatpstateoffice@att.net or 607-772-2000

NEW YORK NATP

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Buy 6 – 10	•	Save 22%*
Buy Any 11 – 20	•	Save 25%*
Buy Any 21+	•	Save 30%*

5	Calculate Quickfinder Order Total — Add amounts from steps 2, 3 & 4	\$ =
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OTHER THOMSON REUTERS MUST HAVE RESOURCES

	LIST PRICE		ORDER QUANTITY		TOTAL PRODUCT ORDER \$		ORDER TOTAL
	Print Book	Online/Download	Print Book	Online/Download	Print Book	Online/Download	
Checkpoint IRS Response Library	N/A	\$329	N/A		N/A		
Quickfinder Tax and Financial Tools+	N/A	\$230	N/A		N/A		
RIA Federal Tax Handbook, 2016 Edition	\$98.25	N/A		N/A		N/A	\$
RIA California Handbook, 2016 Edition	\$95.45	N/A		N/A		N/A	\$
OTHER PRODUCTS ORDER TOTAL							\$

CALCULATE RIA SHIPPING & HANDLING

For RIA Federal Tax Handbook add \$12.00/handbook
For RIA California Tax Handbook add \$12.45/handbook

Note: There is no shipping and handling cost for Checkpoint IRS Response Library and Quickfinder Tax & Financial Tools.

CALCULATE YOUR COMBINED ORDER TOTALS AND SHIPPING CHARGES

STEP #		
1	Enter your total from the Quickfinder section	\$ =
2	Enter your total from this section	\$ =
3	Calculate Shipping & Handling for RIA products	\$ =
4	Order Subtotal (add steps 1, 2 & 3)	\$ =
5	Sales Tax (apply your rate)	\$ =
6	Grand Total	\$ =

+Subscription: Your software subscription to Quickfinder Tax and Financial Tools will automatically renew at the conclusion of your initial term for subsequent terms of one (1) year each, unless and until either party gives the other party written notice of termination before the end of the then current term. Once a renewal term has commenced, it is non-cancellable. Subscription renewals will be invoiced based on the price in effect at the time of renewal and the license fees are subject to increase over the previous year's term, plus shipping and handling, if applicable. If a renewal term has begun, requests to cancel will be effective at the end of the current subscription term.
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