December 2015

NY NATP E-News

NATP National Association of Tax Professionals
NEW YORK THE FIRST CHAPTER

Chapter Office:

NY NATP
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Incoming President's Message

Hello Everyone!

I would like to introduce myself, my name is Ed Arcara and effective January 1, 2016 I will be your new President of the New York NATP Chapter. My firm is located in Buffalo, NY and have been operating my accounting and tax practice for the past 29 years in Western New York. I look forward to meeting many of our members throughout New York State and get some feedback from you as to what you want your Chapter to do for you as a member.

I would like to thank Nick Kounios for his leadership to the New York Chapter for the past three years and I hope to carry on many of the events that were instituted during his time as our leader.

We have a Board Meeting along with an Education Committee meeting coming up in January 2016 where we will be discussing topics for our upcoming education seminars for the summer and fall of 2016. The members of both these committees work very hard to serve the NY NATP membership in many ways including the presentations of seminars, answering member's questions pertaining to New York State tax along with trying to represent our members at the national level of the NATP.

I encourage all members who have NYS tax questions to visit the www.natptax.com website and under the "Chapters" tab you can locate the NYS chapter and post any NYS question you may have. We have chapter members who use this forum to ask questions or give responses to the questions posted.

The 2016 NATP National Conference and Expo will be from August 9th through the 12th in Indianapolis, IN.

As your new President, I look forward to a productive year and meeting as many members as possible and I wish you a safe and happy holiday season.

Edward L. Arcara, CPA
2016 NY Chapter President

Outgoing President

Nick Kounios

I have had the extreme pleasure of working with Nick on the New York Chapter Board of Directors for many years now. Nick is the perfect example of just how much a tax preparer can benefit by getting involved with the Chapter. When Nick first joined the board we all received phone calls from him asking questions during tax season, as the years have gone by I received fewer questions and now I call him with questions and often as he calls me. Due to his hard work and dedication Nick has not only risen through the ranks to become President of the Chapter for the past three years, he also became an Enrolled Agent and one of our best Instructors. Nick's accomplishments have improved and simplified the way the chapter functions today. But most importantly Nick has become one of my closest friends, and for that I will always be grateful.

Richard H. Rottkamp, EA

I first met Nick when he came to our NY NATP seminar in Fishkill in October 2006 (which was my first seminar as a Chapter instructor). Even though our introduction was relatively brief, I observed that he had a great deal of enthusiasm and was committed to making the transition from a tax *preparer* into a true tax *professional.*

Shortly thereafter, Nick joined the Board where he assumed a progression of leadership roles including Education Chair, Chapter Secretary, Chapter Vice President and ultimately Chapter President.

Nick has been a regular attendee at National Conference since 2007. His sales skills have been displayed at Chapter Showcase and that's one of the reasons why the NY Chapter has consistently been able to make substantial donations to the local charities.

I was the senior instructor on the team when Nick first went out for the Chapter in 2010. Since then, he has grown immensely and has become an integral member of our Chapter's educational program.

After serving three full Board terms, Nick (and I) will be stepping off at the end of 2016 but I'm sure that he will always be actively involved with the NY Chapter.

Thank you, Nick, for your dedicated years of service.

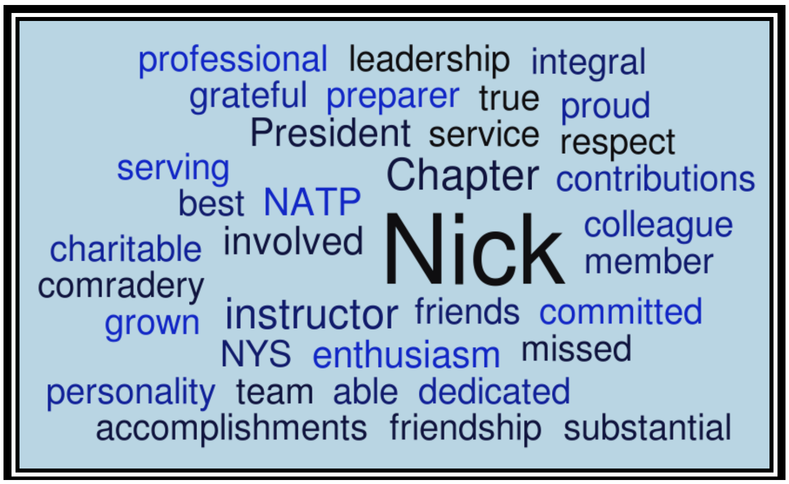
Mike Novick, EA

Some years ago I received multiple phone calls from Nick inquiring about how he could become involved in the NYS Chapter. Shortly thereafter we had lunch at one of the Kingston seminars. From the outset it was obvious that Nick had enthusiasm for education and networking coupled with a great personality. I was pleased to nominate him for the NY Chapter Board and Education committee. Little did I know that he would grow to be a great instructor and Chapter officer. He is now one of my most dear friends and colleague. I am so proud of him and have developed a great respect for his abilities, commitments and professionalism. I thank him immensely for his friendship and service to the NYS Chapter of NATP he's always "good to go!"

Ralph Sommers, EA

I attended a NY NATP course several years ago and met Nick Kounios who was teaching the class along with Rick Rottkamp. Shortly after meeting Nick and Rick I met other members of the board and started to get involved on the board. I have been able to work closely with Nick for the past few years on the Board of Directors and at the National Conference. Nick's leadership, enthusiasm and comradery was a huge factor for me, and I know for others, to get more involved. In addition to his teaching, Nick has been extremely dedicated to the Chapter which can be seen from his contributions as President and other roles. Nick has been an intrinsic part of the Board and he will be missed as President. Thank you Nick for all that you do and have done for the Chapter.

Christopher Bertuglia, EA



In all my years in Leadership, this is one the hardest things I have written. December 31st sees the end of Nick's term as Chapter President. Nick has served the membership extraordinarily well over these past three years. Always quiet about the amount of time it took from his tax and financial practice as well as his family, Nick just kept on plugging away at getting the job done. He valiantly served the entire membership at the National Conference as one of the leaders of the Presidents' Meeting.

Nick always gives everything he does his very best. I was the Lead Instructor on a program we offered for the first time and assigned to work with Nick. Never before did I see that level of effort and dedication to getting the material down and presented effectively. He was responsive to input and never let his ego get in the way (and that's rare in the public speaking community where ego is the usual culprit).

Over his term as President, many things have come forward. His leadership style of empowerment allowed for people to work where their gifts lay. He is always there to support, guide and help out. In the very, very few times when his decision turned out not to be the best, Nick was the first to put the item on the table, say it may not be the best, and roll up his sleeves to get the job done.

Nick followed the number one rule of effective leadership; he leaves the office of NY Chapter President with the Chapter better than he found it. That is all we as members can ask from our officers.

Nick is now one of my truest friends whom I trust completely. It was my honor to be his VP and Education Chair. I am thrilled he has one year left on his Board service so we still have him as our Immediate Past President.

Proud of Nick beyond all words,
Kathryn Keane

Ethics Central *By Kathryn M Keane, EA (Brooklyn)*

Do you have a written Policy Manual?

Do you have a written policy manual or handbook? If not, this is a good year to consider writing one. Why? Well, when the IRS considers preparer penalties, it looks at regular office procedures. Some of the points they consider is if we used checklists, written procedures, as well as common practices. A written manual or handbook codifies some of those issues.

Below are some points that you may want to include in your Policy Manual or Handbook:

- **Form 8863**—new law requires the client to have the Form 1098-T before they file a claim for Education Credits. Currently, there is no requirement for the Form 1098-T to be attached to the return. The Education Credit continues to be a focus of the IRS.
    - What will your policy be?
        - Will you just ask “Do you have a Form 1098-T?”
            - If so, will you ask any other questions?
                - If so, what questions? Will they be on a list/form?
        - Will you require clients bring in the Form 1098-T before transmitting the return?
            - If so, will you keep a copy?
    - Are you asking for other documentation, such as a bursar statement?
- **EIC**—Earned Income Credit remains a huge audit item. The IRS and NYS has been looking at the paid tax return preparer community as deputies in compliance. The $500 penalty is only for the failure to complete Form 8867, the paid preparer checklist. Failure to follow the due diligence rules could result in the 6694 penalty series.
    - What do you see for documentation of the rule of **R A R**?
        - **R** Relationship
            - Birth certificates, adoption papers, placement documentation
        - **A** Age
            - Birth certificates, passport, 3rd party government ID
        - **R** Residency
            - School records (always the best for school aged children)
            - Third party official confirmation that the child resides in the taxpayer’s home for more than six (6) months.
                - Leases, Food Stamp Award letters
                - Medicaid documents
                - Child Care statement
        - The above list is NOT all inclusive, but just a starting point. Review 8867 for other items.
        - What documents are you asking for?
        - Are you asking for documents from all EIC clients?
        - Self Employed clients have a higher level of compliance. NYS has issued some guidance for them. Check out https://www.tax.ny.gov/pit/credits/dtf_215_eitc.pdf

Continued…

Ethics Central *Continued…*

- **ACA**—Another Compliance Activity!!!!
  - Clients must have insurance, be exempt or pay the shared responsibility payment
    - What are you going to ask for?
      - Only 1095 A are required to be entered on the tax return. Non-Large Employers are not subject to the reporting requirements of 1095-C. Most of the insurance companies say the 1095-B won't be out until mid-February. How will you going to handle this? Will you ask for documents? If so, what?
      - As of print date, the IRS has yet to release 2015 requirements. However, the 2014 requirements shed a light on the requirements. Check out https://www.irs.gov/pub/irs-utl/Best%20Practices%205000A.pdf

The procedures you have in your office must be consistently applied in order to be considered standard or regular office practice. Arbitrary application of the procedures can be interpreted as discriminatory or as negligence on your part. Write them down and follow them. If you have any you would like to share in future issues, send them to newyorknatp@gmail.com.

One last thing:

If you see it, copy it
If you hear it, write it down

Take our New Survey!

The NY Chapter is considering hosting a Tax Office Bootcamp in 2016. The Bootcamp would cover practice management, client retention, marketing, team building for office staff and best practices for a successful tax practice. The Bootcamp would be taught over two (2) days and would offer attendees a chance to learn and grow their business while networking with other tax professionals in their area. No CE would be offered.

Tell us if you are interested! The survey takes less than 5 minutes to complete! Click the link below to take the survey!

https://www.surveymonkey.com/r/NYChapBootcamp

Need NYS CE credits? Here's how to get them!

Previously in this newsletter we have discussed who is mandated to earn NYS CE credits, as well as how many credits will be required if you are subject to the mandate. We have received many questions regarding the type of classes and where/when they are available. Currently, the only people allowed to provide these credits are NYS DTF Representatives. In order to receive these credits, and find out more information on dates/times/locations of these courses, you must use the Statewide Learning Management System (SLMS).

To access the SLMS and enroll in the NYS DTF Class Curriculum, you MUST have an Online Services account with NYS DTF. The SLMS link will be located in the Services menu of the Account Summary Home screen.

You can use your already established Tax Preparer Online Service account to access these courses or you can create an account here: https://tax.ny.gov/online/createaccounttpselect.htm

> **Note:** If you already have an established Individual Online Services Account (and not a Tax Preparer Online Service account) you DO NOT have to establish a separate Tax Preparer Online Service account, instead you can enroll as a tax preparer by selecting the "Tax Preparer Registration Program" tab on the services menu of your account summary home screen and follow the prompts for "Register myself as a tax preparer".

Multiple classes are available through the SLMS and ALL COURSES ARE FREE OF CHARGE.

How many credits do I need?

If you are a commercial preparer who:	Then you must complete the curriculum titled:	For this curriculum you must:
• **Prepared ten or more** New York State personal income tax returns **during the years 2011, 2012, and 2013**	• 2016 Registration Education Requirements - 4 CPEs	• Complete 3½ hours of online videos, **OR** • Attend a 3½ hour live session (Not offered in 2015)
• **Prepared fewer than ten** New York State personal income tax returns **during the years 2011, 2012, and 2013**	• 2016 Registration Education Requirements - 16 Qual	• Complete 12½ hours of online learning, and **EITHER** o Complete 3½ hours of online videos, **OR** o Attend a 3½ hour live session (Not offered in 2015)

UPDATE! What courses are available?

If you must complete the **"2016 Registration Education Requirements - 4 CPEs"** Curriculum you must complete 3 ½ hours of course material (online OR in person).
Please be aware, no live courses are available for 2015.

To satisfy the 3½ hours of course material online you must complete the following five (5) courses:

- Federal Updates (1 Hr)
- Standards of conduct & penalties (70 min)
- Overview of Preparer Role & NYS oversight. (30 min)
- Common Mistakes (30 min)
- NYS Tax Law Updates (1 Hr)

You also have the option of viewing any of the below webinars for enhanced learning:

- Main IRS and NYS Forms (15 min)
- Filing Requirements (15 min)
- What is Income? (1 hr 45 min)
- Filing Status (15 min)
- Dependent Exemptions (30 min)
- Federal Adjustments to Income (1 Hr 15 min)
- New York Additions and Subtractions (45 min)
- Common federal schedules (2.5 Hr)
- Tax Preparer Exam 2015
- Tools available to assist tax preparers (15 min)
- Federal Credits (15 min)
- Credits applicable to federal & NYS returns (1 hr)
- New York State Credits (30 min)
- Residency (30 min)
- Common Questions
- Preparer ID Numbers & Permissions (15 min)
- Audit Process and Protests (30 min)
- Online Services Accts Instructions & Overview (15 min)
- Payment Methods & Refund Options (15 min)

If you must complete the **"2016 Registration Education Requirements - 16 Qual"** Curriculum you must complete 16 total hours of course material.
Please be aware, no live courses are available for 2015.

To satisfy the 16-hour online learning requirement you must complete all of the following webinars:

- Main IRS and New York State Forms (15 min)
- Filing Requirements (15 min)
- What is Income? (1 hr 45 min)
- Filing Status (15 min)
- Dependent Exemptions (30 min)
- Federal Adjustments to Income (1 hr 15 min)
- New York Additions and Subtractions (45 min)
- Common federal schedules (2.5 Hr)
- Federal Credits (15 min)
- Credits applicable to federal & NYS returns (1 hr)
- New York State Credits (30 min)
- Residency (30 min)
- Common Questions
- Common Mistakes (30 min)
- NYS Tax Law Updates (1 Hr)
- Overview of Preparer Role &NYS oversight. (30 min)
- Online Services Accts Instructions & Overview (15 min)
- Payment Methods & Refund Options (15 min)
- Preparer ID Numbers & Permissions (15 min)
- Standards of conduct & penalties (70 min)
- Audit Process & Protests (30 min)
- Tools available to assist tax preparers (15 min)

Don't forget!

Register for or Renew your NYTPRIN by 12/31!

For 2015 the fee is $100

Please be aware that you cannot renew/register until you have completed your annual education requirements (see page 6-7). It can take up to 24 hours after completion of the education requirements for the registration/renewal link to become available in your Online Services account.

Attorneys, CPA's and Enrolled Agents are exempt from registration!

EDUCATION CORNER

What a year 2015 has been! We offered a great summer series and our Fall series was successful too. While attendance has not been what it once was, we have actively sought guidance on issues. Thank you to the 267 members that responded to our survey asking what you want from the Chapter: NYS topics with no CE or Federal topics with 6 hours of CE. That is over 10% of the members. If you did not respond, but wish to share your opinion, please send an email to newyorknatp@gmail.com no later than December 29.

In January, the education committee will meet to review 2015 and establish the plan for 2016. It will be a heavy meeting. Watch for the January newsletter for information on the upcoming plans.

During our road trip, many asked questions that were not part of the program. Those questions make great newsletter articles, so watch out for them. If you asked one of those questions, please feel free to send a reminder email to newyorknatp@gmail.com so that we can schedule the articles.

In closing, I would like to thank Amy Cook of our State Office for all her help during the year. Karl Herba of the Syracuse area served as Treasurer and Special Programs and Logistics Team Leader. His duties were too numerous and challenging to list here. Karl's assistance to me is the stuff of legends. Rick Rottkamp of Baldwin has been the third member of my Three Musketeers of Education. Rick served as our Instructor Coordinator and has been instrumental in promoting our series. Rick and Karl have been strongholds of support for both Nick and me. Thank you guys!

This January, the Board is offering two seminars on Basic Income Tax Preparation. There is more information in this e-newsletter. It is a sample test and will be offered in Brooklyn and Franklin Square. If successful, we will offer it in other locations next January.

Thank you to all the members for your emails, faxes and phone calls. I am honored to be your Education Chair. It has been my mission to provide effective and relevant education to you. Let me know if there is anything you think we should be doing by emailing me at newyorknatp@gmail.com.

NY NATP 2016
Basic 1040 & 201 Tax Prep Course

This hands on seminar will provide basic 1040 and New York State tax preparation training to beginning tax preparers, assistants, office managers and clerical support teams. The seminar will give attendees a better understanding of the inputting process for basic 1040 and NYS tax returns. Level: Basic **Register Early—Space is limited!!!**

Upon completion of this course, the tax professional will be able to:

- Determine if a tax return is required
- Determine the correct filing status
- Determine when an individual can be claimed as a dependent
- Properly handle W2 income
- Properly report interest, dividends and capital gain distributions
- Calculate taxable social security
- Properly handle retirement income
- Prepare a basic Schedule A with common itemized deductions

Who should take this class?

- Assistants & Inputters
- Clerical Support
- Beginning Tax Preparers
- Office Managers

Wednesday, January 13, 2016	**Friday, January 15, 2016**
NY Real Estate School	**VFW Post 2718**
1912 Kings Hwy 2nd Flr Bklyn, NY 11229	**68 Lincoln Rd Franklin Square, NY 11010**
Instructor Kathryn M. Keane, EA	**Instructor Richard Rottkamp, EA**
Registration 8:30 AM Seminar 9 AM to 5PM	**Registration 7:30 AM Seminar 8 AM to 4:30 PM**

Pricing:

- **$195** for FIRST attendee
- **$175** for SECOND attendee*
- **$175** for THIRD attendee*
- **FREE** for FOURTH attendee*
- Printed texts are an additional $20 each

Multiple Enrollment Discounts available! *

*Attendees must work for the same firm & registration forms must be submitted together to qualify for discount!

Want to enroll more than four (4) attendees? Contact the state office for more information!

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

Your 2016 NY Chapter Board of Directors

President- Ed Arcara, CPA
Vice President- Karl Herba, EA
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Secretary- George Powers, CPA

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W. Ralph Sommers, EA

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Harris Fishbein, CPA
Michael Novick, EA, Esq
Laura Millard
Kathryn M. Keane, EA

Save the Dates!

NATP National Conference & Expo
Indianapolis, IN August 9-12, 2016

NATP Tax Forums & Expo
Philadelphia, PA September 7-8, 2016 & Las Vegas, NV September 21-22, 2016

NY Chapter of NATP

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NY Chapter Founders Award Past Winners

Ralph Sommers
2013

Wendy C. Loomis
2014

Karl Herba
2015

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The NY Chapter THANKS YOU FOR YOUR SUPPORT!!

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

Name:		**PTIN:**
Address:		
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Phone:		**Email:**
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Name on Card:		
Card Number		
CCV:	Exp:	Billing Zip
Date/Location:		o **Please bill me for printed text**

PLEASE BE AWARE: The Brooklyn location for this class is located on the second floor and the facility has no elevator. The Franklin Square location is located on a lower level and the facility has no elevator.

Pricing for Basic 1040 & 201 Tax Prep Class:

- **$195** for FIRST attendee
- **$175** for SECOND attendee*
- **$175** for THIRD attendee*
- **FREE** for FOURTH attendee*
- Printed texts are an additional $20 each

***Attendees must work for the same firm & registration forms must be submitted together to qualify for discount!**

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.

NY NATP is going green! Textbooks are electronically delivered. If you wish for a printed text, there is an additional charge of $ 20.

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

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NEW YORK NATP

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Buy 6 – 10	•	Save 22%*
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STEP #		
5	**Calculate Quickfinder Order Total —** Add amounts from steps 2, 3 & 4	$ =

OTHER THOMSON REUTERS MUST HAVE RESOURCES

	LIST PRICE: Print Book	LIST PRICE: Online/ Download	ORDER QUANTITY: Print Book	ORDER QUANTITY: Online/ Download	TOTAL PRODUCT ORDER $: Print Book	TOTAL PRODUCT ORDER $: Online/ Download	ORDER TOTAL
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.
* Savings of 30% valid on new orders placed by September 25, 2015. Savings promotion excludes Quickfinder Tax and Financial Tools, PPC, RIA, Checkpoint and CPE and may not be combined with any other offers.

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