

November 2015

# NY NATP E-News



## President's Message

Dear Fellow Members:

First and foremost, I want to thank you all for all the confidence and support you have shown me over the past 3 years. It has been a privilege and an honor to serve as your President.

I am happy to introduce your new President, Ed Arcara. Ed is a great guy and he will not only be an excellent leader but a huge asset on the Board of Directors.

I would also like to thank several people for their help during my Presidency, especially Wendy Loomis and Amy at the state office for all their hard work and dedication and Tricia and Christina at Kathryn Keane's office for the same. They were always ready and willing to help when needed. It made my job much easier.

During our annual meeting this year we were honored to have the new Commissioner of New York State Taxation and Finance, Jerry Boone, speak. His speech was encouraging and inspiring and his presence was greatly appreciated. I would also like to congratulate Karl Herba as the recipient of the 2015 Founders award. This is an honor and well deserved.

For those who were unable to attend our fall series seminars, I would strongly encourage you to attend our winter series seminars. They are "packed" with beneficial and useful tax knowledge.

As the holidays approach, I want to wish you and your families the best. My door will always be open to you to discuss any ideas or concerns that you may have, so please do not hesitate to call me.

Happy holidays and my most sincere thanks to you all.

Best regards,  
Nick Kounios E.A.  
President

### 2015 NY Chapter Board

Nick Kounios, EA  
Chapter President

Kathryn M Keane,  
EA  
Chapter Vice  
President

Edward Arcara, CPA  
Chapter Secretary

Christopher  
Bertuglia, EA  
Chapter Treasurer

### 2016 NY Chapter Board

Edward Arcara, CPA  
Chapter President

Karl Herba, EA  
Chapter Vice  
President

George Powers, EA  
Chapter Secretary

Christopher  
Bertuglia, EA  
Chapter Treasurer

### Chapter Office:

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



**NY Chapter President Nick Kounios meets with NYS DTF Commissioner Jerry Boone at the NY Chapter's Annual Meeting held in Binghamton on October 23, 2015.**

## 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 required 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:
<ul style="list-style-type: none"> <li>Prepared <b>ten or more</b> New York State personal income tax returns <b>during the years 2011, 2012, and 2013</b></li> </ul>	<ul style="list-style-type: none"> <li>2016 Registration Education Requirements - 4 CPEs</li> </ul>	<ul style="list-style-type: none"> <li>Complete 3½ hours of online videos, <b>OR</b></li> <li>Attend a 3½ hour live session</li> </ul>
<ul style="list-style-type: none"> <li>Prepared <b>fewer than ten</b> New York State personal income tax returns <b>during the years 2011, 2012, and 2013</b></li> </ul>	<ul style="list-style-type: none"> <li>2016 Registration Education Requirements - 16 Qual</li> </ul>	<ul style="list-style-type: none"> <li>Complete 12½ hours of online learning, and <b>EITHER</b> <ul style="list-style-type: none"> <li>Complete 3½ hours of online videos, <b>OR</b></li> <li>Attend a 3½ hour live session</li> </ul> </li> </ul>

## 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 at this time.**

To satisfy the 3 ½ hours of course material online you can complete any of the courses below:

- Main IRS and New York State Forms (0.25 Hour)
- Filing Requirements ( .25 hour)
- What is Income? ( 1.75 Hour)
- Filing Status ( 0.25 Hour)
- Dependent Exemptions (0.5 Hour)
- Federal Adjustments to Income ( 1.25 Hour)
- New York Additions and Subtractions (.75 Hour)
- Common federal schedules ( 2.50 Hour)
- Federal Updates (1 hour)
- Overview of preparer role & state oversight (20 min)
- Tax Preparer Exam 2015
- Payment Methods & Refund Options (.25 Hr)
- Tools available to assist tax preparers (.25 Hr)
- Federal Credits ( .25 Hour)
- Credits applicable to federal and NYS returns (1 hr)
- New York State Credits ( .5 Hours)
- Residency ( .5 hour)
- Common Questions
- Common Mistakes (30 min)
- NYS Tax Law Updates ( Approx. 1 Hr)
- Preparer ID Numbers & Permissions (.25 Hr)
- Standards of conduct & penalties (70 min)
- Audit Process and Protests ( 0.5 hour)
- Overview of Preparer Role &NYS oversight. (.5 Hr)
- Online Services Accts Instructions & Overview (.25 Hr)

If you must complete the “**2016 Registration Education Requirements - 16 Qual**” Curriculum you must complete both a 12 ½ hour online course and a 3 ½ hour course (online OR in person). **Please be aware, no live courses are available at this time.**

To satisfy the 12 ½ hour online learning requirement you must complete all of the following webinars:

- Main IRS and New York State Forms (0.25 Hour)
- Filing Requirements ( .25 hour)
- What is Income? ( 1.75 Hour)
- Filing Status ( 0.25 Hour)
- Dependent Exemptions (0.5 Hour)
- Federal Adjustments to Income ( 1.25 Hour)
- New York Additions and Subtractions (.75 Hour)
- Common federal schedules ( 2.50 Hour)
- Federal Credits ( .25 Hour)
- Credits applicable to federal and NYS returns ( 1 hour)
- New York State Credits ( .5 Hours)
- Residency ( .5 hour)
- Common Questions
- Common Mistakes (30 min)
- NYS Tax Law Updates ( Approx. 1 Hr)

To satisfy the 3 ½ hour requirement you must either attend a live seminar or complete the following online webinars:

- Overview of Preparer Role &NYS oversight. (.5 Hr)
- Online Services Accts Instructions & Overview (.25 Hr)
- Payment Methods & Refund Options (.25 Hr)
- Preparer ID Numbers & Permissions (.25 Hr)
- Standards of conduct & penalties (70 min)
- Audit Process and Protests ( 0.5 hour)
- Tools available to assist tax preparers (.25 Hr)

2015 FOUNDER'S AWARD  
RECIPIENT

# Karl Herba, EA



**Karl Herba** (center) receives the 2015 Founder's Award from **NY Chapter President Nick Kounios** (left) and **NYS DTF Commissioner Jerry Boone** (right).



## 2015 Winter Series!

### The 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)

***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. (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. **This section qualifies for one (1) NYS CE for the new NYS Commerical Preparer requirements** (No federal CEs offered for this portion, 1 CE 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.)

### **Our Winter Series Dates Include:**

Nov 30- Dec 1- Latham/Albany

December 2-Middletown

December 3-Staten Island

December 4-5- Carle Place

# 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

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

- **\$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!

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

**Treasurer-** Christopher Bertuglia, EA

**Secretary-** George Powers, CPA

**State Office Director:** Wendy C. Loomis, EA

**Central**

Karl Herba, EA  
George Powers, EA

**Western**

Dana Andrews II, EA  
Ed Arcara, CPA

**Capital (Northern Tier)**

Rick Rottkamp, EA  
{Vacant}

**Southern Tier**

Daniel Paoletti, EA  
Sally Fahey, EA

**Hudson Valley**

Nick Kounios, EA  
Matt Hall, CPA

**Long Island**

Guy Leopold, EA  
Christopher Bertuglia, EA

**Metro**

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



NY Chapter of NATP

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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

Karl Herba, EA  
2015

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We're on FaceBook!  
Search for NY NATP!



Thank you to all who participated in our  
Box Tops Drive!

All collected funds have been donated to a  
local school!

**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!!***

Keep Calm and let the NY Chapter do the  
research for you.  
Like the NY Chapters Facebook Page to stay up to  
date!

Search for "NYNATP"!

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

### *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:**

<i>(Price does not include printed text)</i>	<b>Essential Annual Seminar</b>	<b>IT-201/203</b>	<b>NYS Business (Owego only)</b>
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)*

Name on card: \_\_\_\_\_

Credit Card Number: \_\_\_\_\_ 2

Exp. Date: \_\_\_\_\_ CCV Code: \_\_\_\_\_ Billing Zip Code: \_\_\_\_\_

Signature: \_\_\_\_\_

**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](mailto:nynatpstateoffice@att.net) or Phone: 607-772-2000

# Basic 1040/201 Tax Prep Course Registration Form

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

Name:		PTIN:
Address:		
City, State, ZIP:		
Phone:	Email:	
Credit Card Information:		
Name on Card:		
Card Number		
CCV:	Exp:	Billing Zip
Date/Location:	<input type="radio"/> 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.

## 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



# QUICKFINDER HANDBOOKS AND QUICK REFERENCE GUIDES

TAX PREPARATION TOOLS	Standard Binding	Proview eBook**	3 Ring Binder	Standard Binding	Proview eBook**	3 Ring Binder	ORDER TOTAL	Standard Binding	Proview eBook**	3 Ring Binder	ORDER TOTAL	**AUTO-RENEW / ++AUTO-SHIP
	LIST PRICE			ORDER QUANTITY				TOTAL PRODUCT ORDER \$				
	A	B	C	D	E	F		COLUMN A X COLUMN D	COLUMN B X COLUMN E	COLUMN C X COLUMN F		
EXAMPLE PRODUCT	\$49	\$45	\$52	2	5	6	13	\$98	\$225	\$312	\$635	<input type="checkbox"/> eBook Only
1040 Quickfinder Handbook	\$49	\$45	\$52					\$	\$	\$	\$	<input type="checkbox"/> eBook Only
Small Business Quickfinder Handbook	\$49	\$45	\$52					\$	\$	\$	\$	<input type="checkbox"/> eBook Only
Premium Quickfinder Handbook	\$71	\$67	\$74					\$	\$	\$	\$	<input type="checkbox"/> eBook Only
All States Quickfinder Handbook	\$80	\$76	N/A			N/A		\$	\$	N/A	\$	<input type="checkbox"/> eBook Only
Individuals - Special Tax Situations Quickfinder Handbook	\$49	\$45	N/A			N/A		\$	\$	N/A	\$	<input type="checkbox"/> eBook Only
Depreciation Quickfinder Handbook	\$49	\$45	N/A			N/A		\$	\$	N/A	\$	<input type="checkbox"/> eBook Only
Quickfinder Annual Tax Update	\$49	\$45	N/A			N/A		\$	\$	N/A	\$	<input type="checkbox"/> eBook Only
Health Care Reform Quickfinder Handbook	\$49	\$45	N/A			N/A		\$	\$	N/A	\$	<input type="checkbox"/> eBook Only
Laminated Tax Tables for Individual Returns	\$16	\$12	N/A			N/A		\$	\$	N/A	\$	<input type="checkbox"/> eBook Only
Laminated Tax Tables for Business Returns	\$16	\$12	N/A			N/A		\$	\$	N/A	\$	<input type="checkbox"/> eBook Only
<b>TAX PLANNING TOOLS</b>												
Tax Planning for Individuals Quickfinder Handbook	\$49	\$45	N/A			N/A	N/A	\$	\$	N/A	\$	<input type="checkbox"/> eBook Only
Social Security and Medicare Quickfinder Handbook	\$49	\$45	N/A			N/A	N/A	\$	\$	N/A	\$	<input type="checkbox"/> eBook Only
IRA and Retirement Plan Quickfinder Handbook	\$49	\$45	N/A			N/A	N/A	\$	\$	N/A	\$	<input type="checkbox"/> eBook Only
Quickfinder Tax Tips Newsletter**	\$65	\$60	N/A			N/A	N/A	\$	\$	N/A	\$	<input type="checkbox"/> eBook Only
<b>QUICKFINDER ORDER TOTALS</b>								<b>\$</b>	<b>\$</b>	<b>\$</b>	<b>\$</b>	

## CALCULATE YOUR QUICKFINDER ORDER DISCOUNTS AND SHIPPING CHARGES

STEP #		
1	Enter your total QF order quantity from above	QUANTITY =
2	Enter your total QF order \$ total from above	\$ =
3	<b>Calculate Shipping for Quickfinder</b> — Order Quantity (Step 1) \$5.50/Handbook - \$3/Tax table	\$ =
4	<b>Apply Quickfinder Quantity Discount</b> — Based on your order quantity, calculate your discount dollars off using the table below and circle the appropriate discount percent.	- \$

Buy Any 2	•	Save 5%*
Buy Any 3 – 5	•	Save 20%*
Buy 6 – 10	•	Save 22%*
Buy Any 11 – 20	•	Save 25%*
Buy Any 21+	•	Save 30%*

5	<b>Calculate Quickfinder Order Total</b> — 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	\$
<b>OTHER PRODUCTS ORDER TOTAL</b>							<b>\$</b>

### 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	\$ =

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