

October 2015

NY NATP E-News



NEW YORK
THE FIRST CHAPTER

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Christina Parisi
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President's Message

My fellow NATP members,

I hope this message finds all of you well and hope that you had a good summer. We are currently into fall and looking forward to the upcoming holidays.

I am very excited about our upcoming fall seminars, in particular for our annual meeting. This year we have the privilege of having the new NYS Commissioner of Taxation and Finance, Jerry Boone, as our guest speaker. If you have not signed up yet, I encourage everyone to please try to attend and get a unique chance to meet our new Commissioner. Special pricing is available if you can only make the Annual Meeting and cannot stay for the entire seminar.

I am looking forward to seeing you all at our upcoming Seminars.

As always I appreciate your loyalty and enormous support to the NY Chapter of NATP.

Best regards,
Nick Kounios E.A.
President

FOLLOW-UP!

Burning Questions from the NATP Tax Forum in Philadelphia

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The NY Chapter State Office has received many questions from members regarding the CE required for NYS preparers.

Currently, the only provider of the NYS CE are NYS DTF Representatives/Instructors. NYS DTF will not allow the NY Chapter's Instructors to teach these classes. However, The NY Chapter is able to offer our attendees one (1) NYS CE for our Essential Class. This CE is only available because we have a NYS DTF Representative at the seminar. NY Chapter Instructors are NOT authorized to teach NYS DTF classes.

If there are any changes to the approved providers for these CE requirements, rest assured the NY Chapter will let you know!

For now, to complete your NYS DTF CE Requirements, please see the below information. If you have any questions about troubleshooting the DTF website, please call The Education Chair's office at 718-998-3149. The office is open Monday thru Thursday from 10 AM to 5 PM, excluding Federal holidays.

Where do I get this CE?

- The NY Chapter's Essential Annual Seminar qualifies for one (1) of the NYS CE required for this mandate. Locations and pricing are available later in this newsletter.
- Otherwise, ALL CE must come from the Statewide Learning Management System (SLMS), you can enroll in these classes via your Online Services Account, the link to SLMS can be found under the "Registration and Continuing Education Training Tax Return Preparers" page in your account

Please Note: The Tax Return Preparer Certification course offered by IRS **will not** count towards your New York State continuing education coursework. The IRS course is valuable because it focuses on the preparation of the federal return which is the basis of the New York State return. However, it does not fulfill these NYS requirements.

Continued...

FOLLOW-UP! Continued...

What type of classes are available?

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

How much will these NYS Classes cost?

All of the classes provided by NYS DTF are **free**. If you are interested in a NY Chapter Essential Annual Seminar, please see the registration form at the end of the newsletter.

More information can be found at <http://www.tax.ny.gov/> under the Tax Professionals tab.

If we missed any of your questions, please contact us at info@macanta.com

Keep Calm and let the NY Chapter do the research for you.

Like the NY Chapters Facebook Page to stay up to date on these Registration and CE requirements.

Search for "NYNATP"!



**KEEP
CALM
AND
FIND US ON
FACEBOOK**

2016 John Hnat Memorial Scholarship Awards

Thank you to all who submitted Applications!

Winners will be drawn for the 2016 Scholarships at our NY Chapter's Annual Meeting on October 23rd in Binghamton. The Annual Meeting will be held at Lunch.

REGISTER NOW for the Binghamton Essential Seminar, Seating is LIMITED!

Need a 1040 Class?

Below is a list of NATP's Essential 1040 & Beyond the 1040 Classes in our Area!

Jamestown

November 2-3, 2015

Hauppauge

November 2-3, 2015

New York City

November 4-5 & 16-17, 2015

New Rochelle

November 6-7, 2015

Fishkill

November 9-10, 2015

Kingston

November 11-12, 2015

Rochester

November 18-19, 2015

Mount Kisco

November 18-19, 2015

Binghamton

November 20-21, 2015

Jamaica (JFK Airport)

November 20-21, 2015

Liverpool

November 16-17, 2015

Albany

November 9-10, 2015

Amherst

November 6-7, 2015

2015 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. **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.)



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!

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.

Special Price!

If you can't stay for the entire Binghamton Seminar, but would like to attend the Annual Meeting your cost to attend is only **\$30!**

Annual Meeting is held at Lunch on 10/23, Lunch will begin an approximately 11:45 AM

NY Chapter Annual Meeting

Binghamton, NY
October 23, 2015!

Keynote Speaker:
DTF Commissioner
Jerry Boone!

IN MEMORIAM

JEANNE POWELL

Former Chapter Board member, Jeanne Powell passed away this month after a serious illness. Jeanne served the Chapter with dignity. It was Jeanne that renamed our fall seminar to its current name The NY NATP Essential Annual Seminar.

Anyone who knew Jeanne knew she brought her love of family and service to every conversation. Celebrate Jeanne's life by living each day to the fullest.

**Take the NY Chapter's Survey!**

Do you prefer Federal or State topics at your NY Chapter seminars? The NY Chapter wants to know! Take the Chapters survey at the link below to help us decide what to offer you in 2016!

<https://www.surveymonkey.com/r/NYNATPSurvey>

The NY Chapter thanks you in advance for your participation!

NY Chapter of NATP

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607-723-1022 Fax

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FAX:
607-723-1022

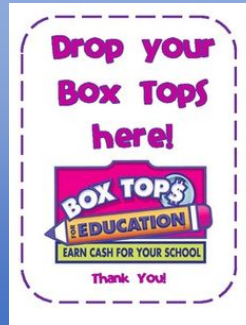
E-MAIL:
nynatpstateoffice@att.net

NY Chapter Founders Award Past Winners

Ralph Sommers
2013

Wendy C. Loomis
2014

We're on FaceBook!
Search for NY NATP!



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

Box Tops can be mailed to 2109 Homecrest Ave, Bklyn 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>

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	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</i> <i>Encore addition-One day only</i> Includes NYS Sales Tax & NYS Corp Tax Problem Solving	
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</i> <i>Chapter Annual Meeting held at lunchtime.</i> <i>Special Guest: Jerry Boone, Comm., 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:

<i>(Price does not include printed text)</i>	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)*

Name on card: _____

Credit Card Number: _____ 2

Exp. Date: _____ CCV Code: _____ Billing Zip Code: _____

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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

NEW YORK NATP

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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
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Tax Planning for Individuals Quickfinder Handbook	\$49	\$45	N/A			N/A	N/A	\$	\$	N/A	\$	<input type="checkbox"/> eBook Only
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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
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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							\$

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