

September 2015

# NY NATP E-News



**NEW YORK**  
THE FIRST CHAPTER

## 2015 NY Chapter Board

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Chapter President

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EA  
Chapter Vice  
President  
718-998-3106

Edward Arcara,  
CPA  
Chapter Secretary

Christopher  
Bertuglia, EA  
Chapter Treasurer

## Chapter Office:

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

Christina Parisi  
Newsletter Editor

## President's Message

Dear Fellow Members,

Fall is back and what better time to commit to expanding your knowledge and your practice. Your NY NATP Chapter is ready to help with a fantastic lineup of seminars. Our Essential Annual Seminar will include exciting topics such as:

**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.

**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.

**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!

I am very excited about our fall schedule because of the variety of topics we are able to offer through your support.

If you have ever considered getting involved in NY NATP, fall is a great time to introduce yourself to our instructors to find out more about this wonderful organization and volunteers.

I personally look forward to meeting many of you while I am on the road.

Warm Regards,

Nick Kounios, EA

## Burning Questions from the NATP Tax Forum in Philadelphia

Based on the questions the NY Chapter encountered at the NATP Tax Forum in Philadelphia, we thought it would be helpful to remind everyone of their NYS Registration and Continuing Education Requirements.

### Who must register and pay?

If you're paid to prepare New York State tax returns or facilitate refund anticipation loans or checks, you may need to register each year with NYS DTF. You may also have to pay a registration fee when you register.

**Please Note:** The IRS has a separate registration program for tax return preparers. You must register with NYS **and** separately register with the IRS.

#### In general, you must register if you:

- are **paid to prepare at least one** New York State return in **calendar year 2015** as a tax return preparer, or
- help to issue or administer a refund anticipation loan or refund anticipation check.

You **must pay a \$100 registration fee** if you are a commercial tax return preparer, commercial preparers are anyone who was:

- **paid to prepare 10 or more** New York State tax returns in **calendar year 2014**, or
- **paid to prepare 10 or more** tax returns in **calendar year 2015**.

### Am I exempt from Registration?

You are exempt from registration if you are a(n):

- Currently licensed Certified Public Accountants (CPA) or Public Accountants (PA)
- Enrolled Agents
- Attorneys currently licensed to practice law
- Employees of a CPA, PA, enrolled agent, or law firm who prepare tax returns under the direct supervision of a CPA, PA, enrolled agent, or attorney of that firm
- Employees of a business who prepare only that business's return or report
- Clerical employees
- Volunteer tax preparers (unpaid preparers)

#### How to Register:

- Each preparer needs to first create an Individual Online Services Account and login to the account to access the Tax Preparer Registration Program and complete the registration process.
  - If you already have created a Tax Professional Online Services Account using your social security number, you can access the Tax Preparer Registration Program directly through your existing account and register yourself as a preparer.
- You must now register with NYS for all tax types you prepare.

*Continued...*

## Burning Questions from the NATP Tax Forum in Philadelphia Continued...

### Do I have to take an Exam?

**Yes!** All commercial tax return preparers (not including those who are exempt) must pass a competency exam by December 31, 2017. More information about the exam will be available in March 2015. The NY Chapter will keep you posted!

### Now that I've registered, How much CE do I have to take?

If you:	Then you:
<ul style="list-style-type: none"> <li>Are a commercial preparer who <b>prepared 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>Must take four (4) hours of continuing education coursework by the end of December 2015.</li> </ul>
<ul style="list-style-type: none"> <li>Are a commercial preparer who <b>prepared 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>Must take:               <ul style="list-style-type: none"> <li>Sixteen (16) hours of continuing education coursework by the end of December 2015, and</li> <li>Four (4) hours of continuing education coursework each year after that.</li> </ul> </li> </ul>

### 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...*

## Burning Questions from the NATP Tax Forum in Philadelphia 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"> <li>• <b>Prepared 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, or</li> <li>• Attend a 3½ hour live session</li> </ul>
<ul style="list-style-type: none"> <li>• <b>Prepared 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 either               <ul style="list-style-type: none"> <li>○ Complete 3½ hours of online videos, or</li> <li>○ Attend a 3½ hour live session</li> </ul> </li> </ul>

### 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](mailto: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"!



## 2016 John Hnat Memorial Scholarship Awards

The New York Chapter of the NATP is once again offering scholarship awards in the memory of John Hnat in 2015 for 2016 classes. John was our Chapter's Past Vice President and was honored as the NATP 2003 Chapter Person of the Year. He believed strongly in the New York State Chapter and was always willing to do what was required to make our chapter a success.

This year the Chapter will offer two scholarships, one for the NATP-NY Essential Annual Seminar and one for the NATP-NY Chapter Comprehensive IT 201/203 Seminar. This year, will be the seventh year that we will offer these scholarships.

You can find both scholarship applications at the end of this newsletter and on the NATP website. The winners will be chosen randomly during our October 2015 Annual Meeting.

**Scholarships are for 2016 classes only, they are not eligible for a 2015 NY Chapter Class!**

Richard Rottkamp, EA

**Don't Wait! Applications  
must be submitted by  
October 9<sup>th</sup>!**

### Scholarship Application Checklist

- ✓ **Complete the appropriate application.**
  - ❖ Applications may be submitted for both scholarships but only one scholarship can be awarded to an applicant for 2016.
- ✓ **Must be an NATP member in good standing.**
- ✓ **Can not have been awarded the scholarship in the past.**
  - ❖ If you previously won our Comprehensive IT201/203 scholarship, you are only eligible for the Essential Annual Seminar scholarship.
- ✓ **Mail, Fax or Email your completed application (with a copy of your NATP membership card) to Richard Rottkamp at the addresses/number on the application no later than October 9, 2015!**

## 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. **This section qualifies for one (1) NYS CE for the new NYS Commerical Preparer requirements** (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 24<sup>th</sup>

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!

### 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

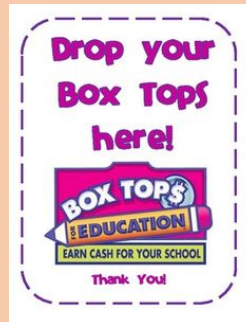
Ralph Sommers  
2013

Wendy C. Loomis  
2014

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We're on FaceBook!  
Search for NY NATP!

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**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](mailto: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!!***





## 2016 John Hnat Memorial New York Chapter NATP Essential Annual Seminar Award

The New York Chapter of the National Association of Tax Professionals has set up a New York Chapter Essential Seminar award in the memory of John Hnat. John was our Chapter's Past Vice President and was honored as the NATP 2003 Chapter Person of the Year. John believed strongly in our New York State Chapter and was always willing to do whatever was required to make our chapter a success.

The NATP New York Chapter Essential Annual Seminar will be awarded to a member in good standing with the New York State Chapter of the NATP. In order to be eligible for the NATP New York Chapter Essential Annual Seminar the recipient must provide a copy of their own current NATP membership card with the completed application.

The John Hnat Memorial NY Chapter Essential Annual Seminar Award recipient will be selected by random drawing during our October 2015 Annual Meeting. A recipient may win the scholarship only once.

Please return this application with required documentation **before October 9, 2015.**

Fax: 516-377-7712 (or) Scan: [RH1040@aol.com](mailto:RH1040@aol.com) (or)

Mail to: Richard Rottkamp, EA  
466 Ashland Avenue  
North Baldwin, NY 11510-2534

Scholarship Application:

Member Name: \_\_\_\_\_ Member ID#: \_\_\_\_\_

Member's Address: \_\_\_\_\_

Member's Email: \_\_\_\_\_

Member's Telephone: \_\_\_\_\_

Number of Years of NATP Membership: \_\_\_\_\_

I certify that the above information is true and that I am a member in good standing with the NY Chapter of the NATP.

\_\_\_\_\_  
Signature of Member



## 2016 John Hnat Memorial New York Chapter NATP Comprehensive IT-201/203 Seminar Award

The New York Chapter of the National Association of Tax Professionals has set up a New York Chapter IT-201/203 Seminar award in the memory of John Hnat. John was our Chapter's Past Vice President and was honored as the NATP 2003 Chapter Person of the Year. John believed strongly in our New York State Chapter and was always willing to do whatever was required to make our chapter a success.

The NATP New York Chapter Comprehensive IT-201/203 Seminar will be awarded to a member in good standing with the New York State Chapter of the NATP. In order to be eligible for the NATP New York Chapter Comprehensive IT-201/203 Seminar the recipient must provide a copy of their own current NATP membership card with the completed application.

The John Hnat Memorial NY Chapter Comprehensive IT-201/203 Seminar Award recipient will be selected by random drawing during our October 2015 Annual Meeting. A recipient may win the scholarship only once.

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Mail to: Richard Rottkamp, EA

466 Ashland Avenue

North Baldwin, NY 11510-2534

Scholarship Application:

Member Name: \_\_\_\_\_ Member ID#: \_\_\_\_\_

Member's Address: \_\_\_\_\_

Member's Email: \_\_\_\_\_

Member's Telephone: \_\_\_\_\_

Number of Years of NATP Membership : \_\_\_\_\_

I certify that the above information is true and that I am a member in good standing with the NY Chapter of the NATP.

\_\_\_\_\_  
Signature of Member

## 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 Instructors: Kathryn Keane, EA, Mick Novick, EA, Esq.	<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 Encore addition-One day only</i></b>	
<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 Chapter Annual Meeting held at lunchtime. Special Guest: Jerry Boone, Commissioner - 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: \_\_\_\_\_

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

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

**Special Dietary Needs? Please circle if applicable: Koshers 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



# 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>QUICKFINDER ORDER TOTALS</b>												
<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

## 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	\$ =

+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.