Happy winter! Seems like just a few days ago we had unseasonably warm weather, the hunters were out in the woods, and suddenly most of the state is under blizzard warnings and the first school closings of the year.

If you missed it we had another great fall conference in September in Bloomington. We had scheduled the conference to be held at the Thunderbird hotel and then a few months prior to the event the hotel was sold and scheduled for demolition and a rebuild. The conference committee scrambled and did a great job finding a new venue, at the Park Plaza Hotel, in time to make adjustments and they pulled it off. We had the tag duo of Sue Voth, EA and Tom O’Saben, EA.

For our 2017 Fall Conference and annual meeting we will be heading back to the Holiday Inn in St. Cloud. Save the dates of September 18th—20th, 2017.

Another save the date, January 5th, 2017 we will be hosting a 2016 Federal Tax update. 8 hours of CE presented by Chris Bird. This will be at the Ramada Plaza Minneapolis, watch for additional information to follow.

I am honored to have been elected the MN Chapter President. I look forward and appreciate the opportunity to serve in this capacity. The board of directors have also elected Debbie Gellatly as the chapter Vice President, Pat Radich as our Treasurer, and Ben Shannon as our Secretary. I would also like to send a great big thank you to Jane Amble, she served on the board for the last 6 years and also as our President for the last 4 years. Thank You.

Also joining our board this year as a new board member is Holly Nelson. Board members that have served in the past and have now started new 3 year terms are Debbie Gellatly, Cindy McLane, and Randy Watkins. I truly value their willingness to serve and commit to a new 3 year term on the board. Thank you.

Enjoy the last of the preseason as the holidays are just around the corner and the new tax season starts sooner than we will all be ready for.

Patrick Zierden.
2016 MN NATP Fall Conference

Our annual Fall Conference is behind us and we are planning 2017. The location will be at the Holiday Inn in St Cloud September 18 – 20. We are working on an elective education day and looking for suggestions. Some of the thoughts are non-profits, MN Sales & Use tax and farming.

We are happy to report we raised $331 for the Ronald McDonald House with our MN Chapter matching funds. We are looking for possible vendors for our 2017 FC so if anyone knows of someone please let us know.

Randy Watkins/Debbie Gellatly – 2016 Co-Chairs

Thank you from your Past President

First of all, I want to congratulate Patrick Zierden on his new position as President of the MN Chapter. Patrick has many years of experience both on the NATP Board and also in his career as a tax professional – you are lucky to have him in this position!

Secondly, I want to thank all of you for allowing me to serve as your Chapter President for the last 4½ years; it has truly been an honor. I have had the privilege of working with some very talented and extremely knowledgeable individuals. There are many wonderful professionals out there that I now call friends and I have colleagues throughout not just Minnesota, but the entire country. I have learned so much from all of you about not only preparing tax returns, but about running an office, networking and just striving to be the best that I can be.

I would like to wish the board and the entire chapter the very best in the coming year.

Jane Amble

Wondering what region you are in?

Here's the breakdown by county:

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MN-NATP Federal Tax Update
Speaker: Chris Bird
January 5, 2017

Are you looking for the latest updates?
Well look no more.

This seminar will offer an in-depth look at Federal tax law and tax updates for 2016 as related to federal taxes. We will look at the latest changes to ACA issues and the 1095 A,B,C and Form 8962 with emphasis on special problems.

Ramada Plaza Minneapolis
1330 Industrial Blvd NE
Minneapolis, MN55413
(612)455-6336

Registration on the www.natptax.com website.
Go to chapters/MN/education and register now.

Registration by 12-23 for $165 (member fee)
and $185 (non-member fee.)

Registration after 12-23 will be $200 (member fee)
and $220 non-member fee.

There is a $50 cancellation fee.

Breakfast, lunch and snacks provided.
Greetings from Karen Brehmer, your local IRS Stakeholder Liaison.

Your client got a letter from the IRS. Inquiring minds want to know:

- How can I help my clients?
- What tools does the IRS offer to make my job easier?
- When I need to contact someone at Practitioner Priority Service or the campus, what’s the best way to do that?
- When should I contact Karen for help?

There are many tools available to you on IRS.gov. When I’m responding to questions from tax pros, here are the pages I refer to most often.

My favorite page for Tax Pros is Basic Tools for Tax Professionals, because EVERYTHING you might need is listed there.

**Notices and Letters**

- Understanding Your IRS Notice or Letter
  - You can view copies of letters so you can compare it to the letter your client received and be certain it’s not a fake letter.
  - If it’s a fake letter, see Report Phishing and Online Scams
  - You can get more information about how to respond to the letter.

**Balance due**

- What if your client owes money and can’t pay in full? The IRS will send a series of letters to the taxpayer and provide information about payment options and installment agreements.

**Penalties**

- What if you feel the client qualifies for penalty abatement? Under what circumstances will the IRS abate penalties? See Penalties at a Glance and First Time Penalty Abatement.

**Amended Returns**

- Use Where’s My Amended Return in three weeks to see if we got the return, and use it to check the progress. The processing time is 16 weeks for an amended return.

**Transcripts**

- Are you using the Transcript Delivery System through e-services to get transcripts? Electronic Return Originators, Circular 230 practitioners, and Reporting Agents are eligible to use TDS. File Form 8821, 2848 or 8655 first. Then use TDS to get transcripts.
- Your clients can use Get Transcript to get transcripts online, or they can get a transcript by mail.
- If your client has moved, use Form 4506-T. It’s a good idea to complete Form 8822 also.
- I always forget the different types of transcripts, and how to order them. You, too? See Transcript Types and Ways to Order Them.

**Identity Theft**

- Main page for ID Theft
  - Can you represent them? Yes. Submit Form 2848 or 8821.
  - Can the ID Theft victim get a copy of their transcript? Well, they can ask. IRS.gov says: “Yes, you can still request a transcript by mail. If we’re unable to process your request due to identity theft, we’ll send you a letter that provides further instructions on how to request your transcript.”
  - See also Instructions for Requesting Copy of Fraudulent Returns on IRS.gov
Can I get a transcript using TDS if my client is the victim of ID Theft?

In an effort to minimize additional ID Theft opportunities, IRS has designed the Transcript Delivery System to not deliver transcripts to requestors when an ID Theft indicator is on the account. Tax Professionals with Power of Attorney can contact the Practitioner Priority Specialty line to obtain a client’s transcript. The taxpayer will receive a notice alerting them of any requests for their transcript and instruct them to contact the Identity Theft toll-free number. Once proper authentication has been completed, we will issue a transcript to the taxpayer.

When I need to contact the Practitioner Priority Service or the campus, what’s the best way to do that?

Submit Form 2848 or Form 8821 before you call PPS. Or, you can fax it to PPS while you are on the phone with them IF you have a separate fax line.

The Practitioner Priority Service is available from 7:00 am to 7:00 pm, Monday through Friday. Since the day I started with the IRS (a long time ago in a galaxy far, far away), we’ve been saying that the best time to call is late in the week, early in the morning. The folks at PPS tell us that is not necessarily the case. I disagree. If you need to call PPS, call on Wednesday, Thursday or Friday, as early in the morning as possible. 7:00 am is better than 7:15 am. Seriously.

Here’s what PPS can do for you:

- Locating and applying payments
- Resolving taxpayer account problems on active accounts
- Explaining IRS communications (i.e. notices and letters)
- Providing general procedural guidance and timeframes
- Providing transcripts of taxpayer accounts (including income verification), when the tax professional is calling in regards to an account related issue

Sometimes PPS needs to transfer you. They will transfer you if:
- You have a tax law question
- If your client’s account is being handled by:
  - AUR (Automated Underreporter, aka CP2000)
  - Correspondence Exam
  - ACS (Automated Collection System)
  - A Revenue Officer or a Revenue Agent

In these instances, it’s best to call the number on the most recent notice your client received. If they threw it away (but no one does that, right?), call PPS and they will transfer you to the correct department.

When should I contact Karen for help?

If you have never contacted me for help before, try it, you’ll like it! What’s the worst that can happen? I may tell you I can’t help. But I won’t make you feel bad that you asked!

I can help you with questions about IRS policy and procedures. I can help you figure out what your first step is, or what your next step is. Here are some examples:

- Any issue where the IRS sent a notice or letter to your client. Please check Understanding Your IRS Notice or Letter first.
- Tax return processing issues
- Identity theft
- Balance due issues, collection issues, Offer in Compromise
- Correspondence Exam or in-person exam issues
- Employment tax issues