

## Upcoming Events

### NATP National Conference

Anaheim CA, Anaheim Marriott  
August 6-9, 2018

### NATP Tax Forums

Atlantic City NJ, Harrah's  
September 20-21, 2018

Las Vegas NV, Planet Hollywood  
September 25-26, 2018

Indianapolis IN, Crowne Plaza  
Downtown  
October 17-18, 2018

## The NY Chapter Summer Series

The Summer of Tax Reform!

Day One: **NATP New York Chapter Summer of Tax Reform: Individuals and Trusts**

Day Two: **NATP New York Chapter Summer of Tax Reform: Tax Reform for Small Businesses**

See Page 2 for in depth details on topics, locations

# E-News

New York Chapter of NATP  
Monthly Newsletter

March 2018

**Reminder:** Tax filing deadline postponed until June 29 for victims of Hurricane Maria in Puerto Rico and the Virgin Islands (<https://www.irs.gov/newsroom/tax-filing-deadline-postponed-until-june-29-for-victims-of-hurricane-maria-in-puerto-rico-and-the-virgin-islands> )



New York State  
Chapter of NATP

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Binghamton, NY 13902



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NewYorkNATP.com

## This Month's Issue

- Summer Series Topics & Dates
- Do you have Tax Season Issues?
- Updated 2018 Withholding Tables Now Available

## Contributors:

Kathryn M. Keane, EA  
Education Committee

# Summer Series Dates/Locations

## Locations:

### Summer of Tax Reform: Individuals and Trusts (8CE)

8:00 am - 5:00 pm

Tax Reform changed the face of the tax world. This hands-on seminar looks at how tax reform impacts the 1040 as well as presenting an overview of Trusts. The session will cover the changes to Schedule A, the expanded Child Tax Credit, new Family Tax Credit, changes to 529 and the how the world turned upside down.

#### At the end of this session, attendees will be able to:

- Recognize the new Standard Deductions and Tax Rates
- Distinguish between Qualified Child and Qualified Relative
- Calculate the 2018 federal state and local tax deduction.
- Discuss the impact of items no longer deductible on the Schedule A
- Calculate the new Kiddie Tax
- Determine the expanded Child Tax Credit
- Understand the new Family Tax Credit
- Advise clients on the expanded uses of 529 funds, including rollover to ABLE
- Understand why clients form Trust
- Recognize the different types of Trusts utilized by clients
- Determine when a Trust tax return is due

### Summer of Tax Reform: Tax Reform for Small Businesses (8CE)

8:00 am - 5:00 pm

Tax Reform for Small Businesses Tax Reform radically changes how our small business clients will move forward. This session will review how Tax Reform will be implemented among our Schedule C filers as well as entity members and corporations.

#### At the end of this session, attendees will be able to:

- Recognize when the Small Business Deduction is available
- Calculate the Small Business Deduction
- Discuss the Small Business Accounting Method expansion
- Utilize Bonus Depreciation, Section 179
- Discuss the new Paid Family/Medical Leave credit
- Recognize the revised NOL provisions
- Discuss the previously available tax breaks no longer available

#### Register Online:

<https://www.natptax.com/Chapters/Pages/NewYorkChapterEducation.aspx>

**By Phone:** Call Member Services (800) 558-3402

Aug. 20-21, 2018

[Hilton Garden Inn Melville](#)

575 Round Swamp Rd

Plainview, NY 11803

Room Rate Code: NYNATP

Aug. 22-23, 2018

[Adria Hotel & Conference Center](#)

221-17 Northern Blvd

Bayside, NY 11361

Room Rate Code: NYNATP

Aug. 27-28, 2018

[Hampton Inn Tarrytown](#)

200 West Main St

Elmsford, NY 10523

Room Rate Code: NYNATP

Aug. 29-30, 2018

[Courtyard Albany Airport](#)

168 Wolf Road

Albany, NY 12205

Room Rate Code: NYNATP

Mail/Fax In Registration forms available at the end of this newsletter

## Tax Season Issues?

Did you have a taxpayer who asked a tricky tax question that you just couldn't answer?

Did you encounter a tax issue not common in your practice and need some guidance?

Send them to the NYS Chapter!

For the past three years, we have gathered your questions and sticky situations into our Tax Season Issues Module for our Fall Series and it has been a HUGE hit!

For this coming year we would love to keep Tax Season Issues fresh and exciting for our seminars, but we can't do it without your help!

Send your "Tax Season Issues" to Rick Rottkamp at [rh1040@aol.com](mailto:rh1040@aol.com)

You may just find the answer in our 2018 Fall Seminar!

## NY Chapter Founders Award

Ralph Sommers  
2013

Wendy C. Loomis  
2014

Karl Herba  
2015

Dwayne "Rocky" Rhodes  
2016

Kathryn M. Keane  
2017



### Newsletter Committee:

Kathryn M. Keane, EA  
Christina Parisi &  
Tricia Santana

## From the IRS Desk

### Updated 2018 Withholding Tables Now Available

Taxpayers Could See Paycheck Changes on February Paystubs

Click below for more information and to read the IRS' post in its entirety

<https://www.irs.gov/newsroom/2018-withholding-tables-now-available>

### Purchasing a Quickfinder?

Will you be buying a Quickfinder for the coming season? The NY Chapter receives a donation for each book ordered when you use the Association Code below, mention NATP or use the Special Order Form provided at:

<http://newyorknatp.com/quickfinder-purchase/>

Quickfinder Association Code Q680

***You also receive a discount when you mention our codes!***

***The NY Chapter THANKS YOU FOR YOUR SUPPORT!!***



**NATP New York Chapter  
Summer of Tax Reform:  
Individuals and Trusts**

8:00 am – 5:00 pm

Name: \_\_\_\_\_ Member ID#: \_\_\_\_\_  
 Designation(s): \_\_\_\_\_ License #: \_\_\_\_\_ PTIN #: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
 Email: \_\_\_\_\_ Phone: \_\_\_\_\_  
 Emergency Contact Name & Phone Number \_\_\_\_\_

Check here if the above address should be your main mailing address.

Registration Fees	Member	Non-Member
Early Bird <i>(ends 8 days prior to seminar)</i>	\$225	\$250
Standard	\$250	\$275
Guest Meal Ticket	\$25	
Paper Materials	\$20	

*Registration includes  
E-Materials  
and  
Lunch*

Location – Please check the box in front of the location you wish to attend.		
<input type="checkbox"/>	Plainview – Hilton Garden Inn - Melville	Aug. 20, 2018
<input type="checkbox"/>	Bayside – Adria Hotel & Conf. Center - Queens	Aug. 22, 2018
<input type="checkbox"/>	Elmsford – Hampton Inn – Tarrytown	Aug. 27, 2018
<input type="checkbox"/>	Albany – Courtyard - Albany Airport	Aug. 29, 2018

Payment Method: Credit Card or Checks made payable to NATP

Name as it appears on CC: \_\_\_\_\_

CC #: \_\_\_\_\_ Exp. Date: \_\_\_\_\_ CVV # \_\_\_\_\_

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

**How To Register:**

**Mail To:** NATP, PO Box 8002 Appleton, WI 54912-8002

**Phone:** 800.558.3402, Ext. 3

**Fax:** 800.747.0001

**Online:** <https://www.natptax.com/Chapters/Pages/NewYorkChapterEducation.aspx>

Cancellation Policy: Cancellations must be submitted to NATP no later than 8 days prior to the seminar to receive a refund. Cancellation is subject to a \$25 fee.



**NATP New York Chapter  
Summer of Tax Reform:  
Tax Reform for Small Businesses**

8:00 am – 5:00 pm

Name: \_\_\_\_\_ Member ID#: \_\_\_\_\_  
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 Address: \_\_\_\_\_  
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Check here if the above address should be your main mailing address.

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<input type="checkbox"/>	Albany – Courtyard - Albany Airport	Aug. 30, 2018

Payment Method: Credit Card or Checks made payable to NATP

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