Chapter Newsletter

News from your Pennsylvania Chapter

Volume 36 Issue 1 July 2026

A Message from the Board

Tax professionals do far more than prepare returns and meet deadlines. You help families build security, guide business owners through uncertainty, and bring clarity to situations that often feel overwhelming. Behind every form is a person depending on your knowledge, accuracy and integrity.

The work is demanding, the deadlines are relentless, and much of what you do happens quietly behind the scenes – but your impact is real. You are trusted advisors, problem solvers, and steady hands during some of people's most stressful moments.

Never underestimate the difference you make. Every return completed correctly, every client reassured, and every business helped forward reflects your dedication and professionalism.

Your work matters. Your expertise matters. And the care you bring to your clients every day makes a lasting difference.

PA NATP Board of Directors

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Help Support Our Charity

As tax professionals, we spend our days helping families plan for a better future. This year lets also help create a brighter holiday season for children in our communities.

At our Annual Tax Conference in November, we are proud to support **Toys for Tots**, and we invite you to join us by donating a new unwrapped toy(s). Your generosity can bring hope, joy and a smile to a child who might otherwise go without a gift for the holidays.

No donation is too small. Every toy represents kindness, compassion, and the spirit of giving that makes our profession and our community stronger.

Please bring a new, unwrapped toy(s) with you to the conference and place it in the designated Toys for Tots collection box.

Help us deliver the biggest refund of all – a child's smile!

Award of Excellence

The awards committee is looking for someone who exhibits the characteristics for the PA-NATP Chapter Award of Excellence. Each year this award is given to a person who has gone above and beyond the call of a good chapter member. Do you know someone who stands out in the tax profession as an educator, writer, speaker, or tax preparer, someone who encourages folks to join the chapter? Is there someone that you know who is a community volunteer who goes out of his/her way to help folks with their tax situations? Maybe they do segments on a radio talk show, speak locally about tax issues, handle a website of their own, do a blog talking about taxes, or are active in Face Book.

Our chapter has over 1000 members who are all busy with their lives and families, but some of them go above and beyond. We want to recognize them for their efforts and abilities. The committees for our chapter are organized in January, and our current committee is looking for someone who fits the above listed qualities. The committee does not know all the chapter members, so we would appreciate your help to recognize a deserving chapter member at our annual conference in November.

We who are on the committee do not know all the members since everyone is scattered throughout PA, but we do know there are many out there who are doing great things. Please nominate someone that you believe their persona exhibits the above listed qualities who would be deserving of our Chapter Award of Excellence. Submit their name, address, and telephone number along with a short paragraph about why you think they should be selected. Include your information in case we need to contact you to clarify details. Send your information to Chuck Evans, Jr., 581 Hopewell Road, Downingtown, PA 19355 (email: evansjrc@verizon.net) or to Joyce Jones, at 395 Double J Lane, New Castle, PA 16101 (email: joycejones@zoominternet.net). We need this information by August 31, 2026, so the committee can select a winner and prepare the award.

Prior year winners are:

2002 – Linda Bliel	2003 – John Killian	2004 – Kathy Bowman
2005 – Denise Madeira	2006 – Angela Leasure	2007 – Sam Wingard
2008 – Rich Miller	2009 – Sean Brennan	2010 - Patti Blum
2011 – Justina Tushak	2012 – Patty Turner	2013 - None
2014 – Denise Brandt	2015 – Erica Knight	
2016 – Mary Jane & Drew Stump		
2017 – Dave Fleming	2018 – Holly Whiteside	2019 – Patti Blum
2020 – Joyce Jones	2021 – Susan Bure	2022 – Charles Evans
2023 – Jeff Cohick	2024 – None	2025 – Holly Whiteside

A Little Humor

The Case of the Dependents

A tax preparer was reviewing a new client's return and asked the standard question: "Do you have any dependents?" The client replies, "Yes-three".

"Great," the preparer said. "How old are they?"

The client answered:

"Well, the first is 42 and lives in my basement.

The second is 38 and keeps borrowing money.

And the third is my brother-in-law who 'just needs a place to stay for a few weeks."

The preparer blinked and said, "Those aren't dependents."

The client sighed and replied, "Tell that to my bank account."

Tax preparers don't have nightmares: they have clients who say, "I forgot one little thing…."

Tax season: Where "just one quick question" is never just one quick question.

Client: "This will only take five minutes." Tax Professional: starts another pot of coffee….

"My favorite tax deduction is the one clients remember BEFORE I hit Transmit"

PA-NATP SCHOLARSHIP APPLICATION INSTRUCTIONS

DEFINITION: A scholarship can be awarded to any active member of the PA-Chapter of National Association of Tax Professionals for any of the following:

1. PA-NATP Annual conference
2. PA-NATP Education Events
3. Enrolled Agent Test Part 1
4. Enrolled Agent Test Part 2
5. Enrolled Agent Test Part 3
6. Annual Filing Season Program Exam

INSTRUCTIONS:

1. Complete PA-NATP Scholarship Application and send to scholarship committee chairperson: Joyce Jones, 395 Double J Lane New Castle, PA 16101
2. **Applications must be received by September 7th of the current year.**

If you are chosen as a recipient, you will be notified by mail by October 31 of the current year.

At the PA-NATP Annual conference and Education Events you will be recognized as the recipient of the Scholarship for that event.

Once the committee has made its selections, you will be registered for your event after you have been notified by mail.

Failure to attend the event will result in your being billed for the repayment of the cost of the event and any cancellation costs.

Attachments required for reimbursement:

1. For Enrolled Agents testing, a copy of the payment receipt when you registered for the EA Exam from PSI Services and proof that you took the test.
2. Other events: If you registered for the event before you were notified that you were a winner, you must provide a receipt of payment and event registration. If the chapter treasurer registers you for the event this step is not necessary.

Send all attachments to committee chair: Joyce Jones, 395 Double J Lane, New Castle, PA 16101

Scholarships are non-refundable and non-reimbursable.

You may apply once every two years for the annual conference or education event.

PA-NATP SCHOLARSHIP APPLICATION

NAME_____
ADDRESS_____
CITY_____ **STATE**_____ **ZIP CODE**_____
TELEPHONE NUMBER_____

SCHOLARSHIP FOR WHICH YOU ARE APPLYING: (PICK ONLY ONE)

1. **PA-NATP Annual Conference**_____
2. **PA-NATP Seminar or Educational Event**_____
3. **Enrolled Agent Test Part 1**_____
4. **Enrolled Agent Test Part 2**_____
5. **Enrolled Agent Test Part 3** _____
6. **Annual Filing Season Program Examination** _____

Explain why you want to attend the event chosen from the above list:

_____
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Send completed application to Joyce Jones, Scholarship Committee Chairperson, 395 Double J Lane, New Castle, PA 16101.

Office Management

The Pennsylvania Chapter of the NATP provides a member benefit of ordering tax and related books and information at a discount from Tax Materials, Inc. and Thomson Reuters Checkpoint. Every tax office should have these various informative tools to help in the planning and preparation of tax returns. By ordering through us, these companies help support our chapter with a donation for each purchase.

To order The Taxbook™ or WebLibrary products and the Quickfinder tax preparation tools, go to our Chapter website at https://panatptax.com. The links for the order forms are on the left side of each web page under “What’s New”. By using code Q680 when ordering your QuickFinder books you will receive a discount. Enter code 488 if you are purchasing Taxbook™ materials to receive your discount.

Get Involved in Our Chapter! Included with NATP membership

Getting involved in your Chapter is a great way to stay up to date on state and local tax issues and network with tax professionals in your area. Here are some Chapter opportunities available to all members: Register for local education seminars on state and local tax topics. The PA Chapter is holding our Annual Conference in November.

- Volunteer and share your state and local tax expertise with other members.
- Attend state Chapter meetings where members can exchange ideas, solve problems, and discuss issues with other state members.
- Reach out to fellow members for support or advice about state and local tax issues.
- For more information or to contact our Chapter, visit http://panatptax.com.

Congratulations!

Thank You to All Candidates and Congratulations to Our New Board Members!

We extend our heartfelt gratitude to everyone who ran for the 2026 PA-NATP board. Your dedication and willingness to serve our community are truly commendable.

As we look forward to a great year ahead, we want to remind all members that your involvement is invaluable. If you feel you can contribute, we have opportunities available at the annual conference, membership, newsletter, and public relations committees. Your participation can make a significant difference.

Thank you once again for your commitment and enthusiasm. Together, we can achieve great things!

Respectfully submitted,

Becky Naylor, EA – PA NATP Chapter Secretary

PA-NATP Mission Statement

• To unite those engaged in the practice of preparing Federal, State and Local Taxes. • To foster and promote NATP's contributions toward the high standard of the tax preparation profession. • To promote and protect the interest of tax professionals everywhere for the public benefit. • To promote and maintain high standards of conduct in the tax preparation profession as expressed in the Code of Ethics and the Standards of Professional Conduct of the National Association of Tax Professionals. • To work with the National Association to provide and promote continuing tax education programs for all members of the Association, particularly on issues and changes in the tax laws of the Commonwealth of Pennsylvania.

Save the Dates!

PA NATP ANNUAL CONFERENCE-2026
November 16th and 17th, 2026
The Penn Stater Hotel and Conference Center – State College, PA
Hotel Reservations can be made at https://reservations.travelclick.com/9877123?groupID=5047494

PA NATP ANNUAL CONFERENCE-2027
November 18th and 19th, 2027
Best Western Central Premier Hotel and Conference Center – Harrisburg PA

***We're working hard to update and refresh our website. Please check it out at Welcome | Pennsylvania Chapter of the NATP

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