

# NATP VIRGINIA NEWSLETTER



## Updates to the Corporate Transparency Act

The injunction that was placed on the CTA has been lifted. FINCEN has yet to issue any official deadline as of 01/24/2025, but their official stance is to encourage voluntary submission to avoid having to do a last minute filing with tight deadlines.

Read More [HERE](#)

## 2025 NATP Tax Forums & Expo

Here's what NATP has coming up, mark your calendars!

- ☒ Las Vegas | Sept. 17-18 | Paris Hotel
- ☒ Philadelphia | Sept. 26-27 | Sheraton Downtown
- ☒ Dallas | Oct. 3-4 | Omni
- ☒ Orlando | Oct. 21-22 | The Florida Hotel and Conference center

## Calling all Writers! WE NEED YOU!

Are you an expert in a topic and would like to share your knowledge or do you just love writing? The newsletter team would love to hear from you! We know there are a lot of talented individuals within our community and we would love to showcase your talent! Please send your article proposal our newsletter team. Deadlines for articles will vary depending on the newsletter tempo for 2025.

## WHAT'S IN YOUR TECH STACK?

BY: AMANDA MITCHELL

As tax professionals, staying efficient and competitive means embracing the right technology. With tax season around the corner, now is the perfect time to evaluate and optimize your tech stack. **CONTINUED PAGE 5...**

# A LETTER FROM OUR PRESIDENT



## DEAR VIRGINIA NATP CHAPTER MEMBERS

I am honored for the opportunity to serve as the 2025 President of the Virginia National Association of Tax Professionals. I have been preparing tax returns since 1977, working in New Jersey, Germany before moving to Virginia in 2005. I have been a member of the Virginia Chapter of NATP for 19 years, served on the Chapter Board for 10 years and was the Chapter President in 2015. As such, I believe I have a good understanding of the Chapter – where it stands and where it needs to go.

We need help to make the Virginia Chapter grow. I encourage each of you to invite a friend to join our chapter, even if they do not prepare taxes. I'm sure they will learn something and have fun meeting people and attending the various courses and auction at our annual conference.

I would like to see more members attending our annual conference. This year, 2025 the conference will be in Richmond. The Board is currently looking into possible venues and will share the outcome very soon. We are considering having a meet and greet and our traditional charity auction the night before the conference. Any suggestions and assistance regarding these functions will be greatly appreciated and we ask each member to bring an item or two to be auctioned. All proceeds will go to the charity which will be announced before the conference.

The plan is to have a minimum of four Newsletter this year, with this being the first! I am asking members to submit tax issues to be posted in the Newsletters, along with any tax jokes, or anything else tax related. This is a members Newsletter and the more participation we have, the better the outcome.

The Spring 2025 and Summer 2025 Newsletters will announce the classes being offered at our annual conference. If you would like to have a particular class, please send me an email with details and it will be presented to the Board for consideration.

The Chapter has a website, [vanatptax.com](http://vanatptax.com), where you can find the names and contact information of the 2025 Board Members. The goal is to expand the website with other suggestions from our members. Additionally, a Facebook group is being created for members to post tax questions for feedback.

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## IMPORTANT DATES:

- Jan. 27th: Filing Season to Begin
- Jan 30: Due date for W-2s and 1099s
- Feb. 15: Deadline for 1099-B/1099-S
- March 15: 1120-S and 1065 deadline
- April 15: Individual Returns deadline

# A LETTER FROM OUR PRESIDENT

## **PRESIDENTS LETTER CONTINUED...**

Did you know as a NATP member there are many benefits at the National level such as research tools, current IRS issues, and continuing education. I hope that our Chapter can augment those benefits with information unique to Virginia and provide a means of networking amongst our many professionals. I value each of our members and I respect any questions and concerns you may have. I look forward to interacting with all of you during the year and seeing you at our annual conference.

Sincerely,

April Bittle-Kurzke



## **A NOTE FROM SARA**

It is with great pleasure to welcome April as our 2025 President, so deserving of the position. April has been with NATP for eighteen years, she has been the rock of the organization since I've been around. Folks speak highly of her whenever there's a conference.

January 8th, 2025 marked the first meeting of the NATP board meeting. Please see the following pages for contact information.

We are looking into possible events for the requirement of national to hold three events annually...

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# A NOTE FROM SARA

Our leader, April is opening her home for one of these events, can't wait. Let's stage a tailgating party in her neighborhood...haha

Chris Smith has updated the venues in Richmond. We are still confirming the location for the November 2025 conference. Please stand by for more information to come.

Reminder all NATP board, you need to complete your BOLTS by June 1, 2025.

On a sad note, we say goodbye to Frank Doe who was a NATP member from day one. He will be truly missed. God bless him, he was always smiling.

A couple helpful hints, always make sure you have a WISP in your office. Written information security plan! And have your IT group sign off on it annually.

For 2024 many are asking about the business BOI for reporting. If you are an officer, director or shareholder with respect to corporations including LLCs created in the U.S. by filing a document with a secretary of state or other similar office under laws of state; at this time, it is on hold until they can figure out how to implement it or not.

Wishing everyone has a super tax year!! The sign on my desk states "ALL STRESSED OUT and no one to choke" ...enjoy.

Sara Doe, EA

FEBRUARY 2025

NATP VIRGINIA

# MEET YOUR 2025 BOARD

## THE OFFICERS

|                |                           |                                         |
|----------------|---------------------------|-----------------------------------------|
| PRESIDENT      | APRIL BITTLE KURZKE, AFSP | 908-295-9730<br>APRILKURZKE@YAHOO.COM   |
| VICE-PRESIDENT | MANISHA ELHANCE, CPA, EA  | 703-272-7894<br>MANISHA@VTAADVISORS.COM |
| SECRETARY      | TERRY STEINIGER           | 540-786-4090<br>TSTEI@COMCAST.NET       |
| TREASURER      | JUSTIN SMITH, MBA         | 540-343-2767<br>JUSTIN@NEELYS.CO        |

# MEET YOUR 2025 BOARD

## ADDITIONAL BOARD MEMBERS

|            |                     |                                          |
|------------|---------------------|------------------------------------------|
| NEWSLETTER | MICHAEL BRATT, AFSP | 703-609-2490<br>BRATTTAX@GMAIL.COM       |
| NEWSLETTER | SARA DOE, EA        | 703-283-3848<br>SDOE@PA-ITD.COM          |
| VENDORS    | JOE PARKER, CPA     | 540-642-4138<br>JOEPARKERCPA@VERIZON.NET |
| BYLAWS     | DONN SHINN, EA      | 703-470-9260<br>DDSHINN63@GMAIL.COM      |
| EDUCATION  | CHIRS SMITH, AFSP   | 804-350-9566<br>CHRIS@SMITHTAXRVA.COM    |
| NEWSLETTER | AMANDA MITCHELL, EA | 571-946-2902<br>AMANDA@H6SBS.COM         |

# WHAT'S IN YOUR TECH STACK?

BY: AMANDA MITCHELL, EA

Here are some must-have tools to streamline your practice and enhance client service:

## 1. Tax Preparation Software

Modern tax preparation platforms like Drake, ProConnect, and UltraTax CS are designed to handle complex tax scenarios with ease. Look for software that integrates seamlessly with your existing systems and supports e-filing to save time and reduce errors.

## 2. Document Management Systems (DMS)

A reliable DMS is essential for organizing and securely storing sensitive client documents. Tools like Canopy, Lacerte DMS, or SmartVault offer encrypted storage, e-signature capabilities, and intuitive organization features.

## 3. Client Portals

Client portals simplify communication and document sharing. Platforms like TaxDome and Karbon allow clients to upload files, view progress, and securely exchange sensitive information without the back-and-forth of email.

## 4. Workflow Automation

Tax season can get hectic, so automating repetitive tasks is a game-changer. Tools like Jetpack Workflow or Xero Practice Manager help streamline processes, track deadlines, and improve collaboration within your team.

## 5. Accounting Software Integration

For tax preparers who also offer bookkeeping services, integration with accounting software like QuickBooks or Xero ensures seamless data transfer, reducing duplication and errors.

## 6. Cybersecurity Tools

With increasing cyber threats, safeguarding client data is paramount. Invest in tools like multi-factor authentication (MFA), encrypted email services, and endpoint protection software to keep your systems secure and compliant.

You might be wondering what other's use and have success with and jump with what your friends are using. Coming from someone who did just that and HATED what I ended up with, I would encourage you to get a demo of each and do a test-drive to see if it is something that will work for you. My current stack includes: Drake, QuickBooks, TaxDome, Canva, Microsoft Suite, BlueJ, and Motion. I have strategically chosen each to streamline processes and minimize overlap so my firm runs as lean as possible. Your tech stack can make your life easier or much harder than it needs to be. Remember, as always, do your homework and choose wisely!

## 2025 VIRGINIA ANNUAL TAX CONFERENCE

- Location: Richmond, VA
- November 6&7 2025
- More details to be announced later in the year.

## STAY TUNED