



Jim Vann, will be our National Representative at the Dillard Conference this September 29 -Oct. 1. He would like to meet you, answer any questions and get your feedback



Jim Vann

NEWS FOR OUR MEMBERS



Summer 2024!

A MESSAGE FROM OUR PRESIDENT

Dear Members of the Georgia Chapter of the NATP,

I hope this message finds you well. As we navigate through the middle of 2024, I am proud to reflect on the progress we have made together and excited about the opportunities that lie ahead.

This year has been marked by significant tax legislation changes and policy, and our community has risen to the challenge. Your dedication to staying informed and providing top-notch service to your clients has not gone unnoticed. I am continually inspired by the professionalism, expertise, and commitment each of you brings to the field of tax preparation and planning.

Our chapter has been active in offering educational resources, workshops, and networking opportunities. These initiatives are designed to keep you at the forefront of our industry. I encourage you to take full advantage of these offerings, as continuous learning and professional development are crucial in our ever-evolving profession.

I am also thrilled to announce our upcoming Annual Conference in Dillard, GA from September 29 to October 1. This event promises to be our most engaging yet, featuring distinguished speakers, comprehensive training sessions, and ample opportunities for networking with peers from across the state. I urge you to register early and be a part of this enriching experience.

As we move forward, I invite you to share your thoughts, ideas, and feedback. Our chapter's strength lies in its members, and your input is invaluable in guiding our future direction. Let us continue to support each other, uphold the highest standards of our profession, and work together to achieve excellence.

Thank you for your unwavering commitment to the NATP and to the clients we serve. Together, we will continue to elevate the standards of tax practice in Georgia.

Warm regards,
Matt Lowery
President
Georgia Chapter, National Association of Tax Professionals (NATP)

Upcoming Education

NATP Tax Forums

LAS VEGAS | Sept. 18-19, 2024
LOUISVILLE | Sept. 30-Oct. 1, 2024
WASHINGTON, D.C. | Oct. 19-20, 24
[Register @ NATPTAX.com](https://natptax.com/register)

Georgia 2024 State Conference and Annual Meeting

September 29th - October 1st

Come celebrate Georgia Chapter's 30th year of providing top quality tax education. Our presenters this year are David and Mary Mellem. Don't miss your chance to learn from these two nationally known tax educators.

[Register @ GeorgiaNATP.com](https://georgianatp.com/register)

(Or scan this QR Code with your phone)



The Sam Grubbs Memorial Scholarship Foundation, Inc. is actively seeking eligible recipients for our Annual Scholarship Award. There are two separate classes of scholarships awarded. The traditional scholarship (up to \$1,000 depending on funds available*) shall be awarded to persons associated with GA NATP, related as described in IRS regulations for Qualifying Child and enrolled in a traditional college or technical school. The second nontraditional scholarship (up to \$500 depending on funds available**) shall be awarded to a member of GA NATP in good standing to aid in financial assistance in obtaining a certification to practice such as an Enrolled Agent, etc.

There will be several fund raisers throughout the duration of our GA NATP Fall Conference in Dillard, GA, such as the 50/50 raffle, the bingo and the silent auction. Last year we raised \$3,250 for the scholarship fund! We appreciate all who support our efforts and participate in these fund raisers.

The scholarship application can be found on the GA NATP website at www.georgianatp.com and also in our Facebook group under the “files” tab. Please submit applications no later than September 30th to the contact information on the application.

*funds will be payable directly to the school

**funds payable to member after submitting receipts for items such as study materials/software/classes

Announcement of Candidates to fill Directors Positions on the Georgia Board

The following people will be on the ballot this September at our Annual Dillard Conference:

John F. Beazle IV Donald R. Harrell Lynn Quick Michael Garrison

The bios for each candidate appear on the following pages. We ask that you read the candidate's bios and give each candidate your consideration. Directors serve a three year term.



John F. Beazle IV

Growing up and educated in NE Ohio, I graduated Mount Union College (now University of Mount Union) with an Accounting and Economic degree and a heavy concentration in Computer Science. I then joined the U.S. Navy as an aviator, was commissioned in May 1973 and earned my "Wings of Gold" in November. After serving our great nation throughout the world for 20+ years, I retired in August 1993.

Returning to my enjoyment of finance and numbers I first became a stock broker and then a tax professional. I operated a Jackson Hewitt corporate store during the tax season of 1998 and then bought the franchise in May 1998. Operating as many as 12 locations in four territories in NW Georgia until October 2010 when I gave the franchise back to the franchisor and "went independent" as they say in the industry.

At that time, Advanced Tax Specialists, Inc. was born. At the end of 2023 Advanced Tax Specialists, Inc. was closed and Plan B Tax Solutions LLC was born.

I am an Enrolled Agent (since 2003) and NTPI Fellow. I am a member of NATP, NAEA and NCPE. I have served on the state boards of NATP and NAEA in multiple positions including President and Vice President.



2024 Board of Directors Nomination Form

Applicant's Name: Donald R. Harrell

Email: dharrell@hitsfinancial.com

Telephone:

Business: 478 285-6619

Cell: 478 998-3899

Business Name: H.I.T.S. FINANCIAL, INC.

Address: 623 College Street, Suite A

City Eastman State Georgia Zip 31023

Email: savedollars@hitsfinancial.com

Office Telephone 478 285-6619

Fax: 866 886-1584

Area of Responsibilities (experience):

I am a Senior Tax Advisor who utilizes the Annual Filing Season Program(AFSP). After becoming a tax preparer in
1992, I established my own firm -H.I.T.S. Financial, Inc.- in May of the subsequent year. I have 32 years of experience
in the tax preparation and tax resolution industry.

What will you contribute to GA NATP Board of Directors? In addition to having 32 years of tax preparation
and tax resolution experience, I am highly proficient at constructing positive, team-building relationships within
organizations. Further, I provide instructional opportunities for both individual and business clients to increase their
awareness in developing tax and financial literacy.

Number of Years as a member of NATP? 29 years

Please attach a photo of you.





Lynn Quick: President and CEO of Professional Accounting and Financial Services

Lynn Quick is the esteemed President and CEO of Professional Accounting and Financial Services, a leading accounting firm located in Cartersville, GA. With a legacy of excellence and trust, Lynn established this business in 1987, and over three decades, she has built a reputation for unwavering professionalism and reliability among her clients and peers.

Throughout her career, Lynn has been recognized with numerous awards and has made significant contributions to her community through her service on various boards. Her dedication and leadership have earned her several accolades, including:

Small Businessperson of the Year (2002): ** Awarded by the Chamber of Commerce for her outstanding contributions to the business community.

Woman Achievement Nominee (2000 and 2002): ** Recognized by the YMCA for her remarkable achievements and impact.

President, National Association of Insurance and Financial Advisors – Cartersville Chapter (2002-2004): ** Demonstrated exceptional leadership and dedication in the field of insurance and financial advisory.

Member, Cartersville Bartow Chamber of Commerce (33 years): ** Served as a committed member and held the position of Director of Finance for four years, contributing to the financial stability and growth of the organization.

Member, Cartersville Bartow County Rotary Club (25 years): ** Actively participated in community service and rotary initiatives, exemplifying the Rotary motto of "Service Above Self."

Board Member, Advocates for Bartow's Children (6 years): ** Played a crucial role in supporting and advocating for the welfare of children in the Bartow community. Spearheading an annual Motorcycle Ride (Leathers and Feathers) to benefit permanent housing for aging out Youth.

Board Member, Georgia NATP (2008-2011) (2020-2022): ** Contributed her expertise to the Georgia chapter of the National Association of Tax Professionals, serving as a dedicated board member.



Treasurer, Sam Grubbs Memorial Scholarship Fund: ** Managed and ensured the financial integrity of the scholarship fund, supporting educational opportunities for deserving students.

President, Etowah Valley Humane Society (2021-2022): **Showcased her passion for animal welfare and community involvement by leading the humane society with dedication and vision.

President, Bartow County Rotary Club (2022-2023): **Led the club with distinction, promoting community service and fostering fellowship among members.

Lynn's professional journey is marked by her commitment to excellence, her passion for community service, and her ability to inspire trust and confidence in those she serves. Her legacy continues to thrive as she leads Professional Accounting and Financial Services with unwavering dedication and a vision for a prosperous future.

Lynn R Quick, EA



Michael Garrison, EA is the owner of Garrison Tax, located in Lawrenceville, GA. He began his tax career after college working for the Internal Revenue Service. He began in Collection, then moved to the Automated Collection Service (ACS) and finally to Office Audit.

His time at the IRS included assignments to Review Staff, the Atlanta Service Center, Teaching training classes and various Acting Manager assignments.

He has been a member of NATP for 28 years and has served on the Georgia NATP board for many years. Currently, he is on the Education Committee and is the Georgia's Board Vice-President.



**2024 Savannah Regional Classes
Held June 17-18, 2024 at the
Hyatt Regency Savannah, GA**
**Thank You! to all our members
who attended our recent meeting
in Savannah. Our speaker,
Kathryn Keane, presented topics
that ranged from the 1099-K to
the form 1041. If you weren't
there you missed great
education, great food and an
opportunity to enjoy our host
city. We hope you will all plan
to attend next year event**



Georgia Chapter Board of Officers/Directors

Matt Lowery – President
Michael Garrison– Vice President
Amber Kay– Secretary
Cecil Norris – Treasurer

Other Directors

John Beazle –Director
Sandra Defoe –Director
Audrey Gibbons–Director
Shirley King–Director
Kella Nelson–Director

Georgia Tax Tip:

How to Request an Electronic 1099-G with a GTC Account:

1. Go to the GTC website at <https://gtc.dor.ga.gov> and log into your GTC account.
 2. On the Home page, under the Summary tab, click the See more hyperlink.
 3. Under the Management section, click on the Opt-in/out of Electronic 1099-G hyperlink.
 4. Review the information on the Electronic 1099-G Request screen. Select "Yes" to make your 1099-G available electronically. Click the Next button.
 5. Click the Submit button on the Summary screen.
 6. Click OK to confirm you want to submit the request.
- A confirmation page will appear with the confirmation number and confirmation code.

**Check out the Georgia Chapter's Website @ WWW.GeorgiaNatp.com and our
Facebook Page www.facebook.com/groups/GANATP for upcoming events
and important updates.**

Welcome To Our Chapter's New Members!

Akiyah D Shannon
Angela Smith, AFSP
Anitra J Griffin, CPA
Annette Jackson
Anthoneal Newman
Ashlyn Solomon
Aydin Barnes
Bob Cook
Brandon Dula
Brenda Cooper
Brenda Villa, CAA
Carlos Antoine Lock
Carr Vaden
Charles Peters, CPA, CRTP
Conley Langford, Jr
Cordelia Hearse
Corina Steele
David Pierce
Denise Marie Filmore
Edward J Quigley
Elaine Torres, EA
Elizabeth Makinde Adegboju
Elizabeth W Brown
Elizaveta Korneeva
Erica V Smith

Erika Jones
Eunhee Cho
Fred Thaggard
Glen L Graves, II
Holly Scott
Jameen R Adams
Jeffrey Tran Ly
Jennifer Richardson
Jessica Bost
Jessica Bustamante
Jose Paul Nedumpurath, EA, MBA
Juliette Hart
Kamilah Gothard
Katia Reyes Midence
Katie Brock
Kerrell Ardrenia Tyler
La June J May
LaKeiya Keese, EA
Lana S Hendrickson
Lee Villegas
Leslie Anne Brown, AFSP
Lisa Batiste
Lisa Brock, EA
Lisa Larry White
Martha L Mills, EA

Mary Baccus
Melissa A Rhodes, CPA
Melody Ann Level
Mely Arvelo, EA, MSA
Michael Hicks, Jr
Michelle Little
Michelle Yvonne Stockdill
Milton M Peek
Naeemah John Chike
Nicole Bell
Pauline D Hayes
Phyllis C Conway, EA
Quinika Brown
Sharon Wilks, EA
Shirley Felder
Tabitha Elizabeth Relota
Tanvir Mahmud
Tanya Butler, AFSP
Teresa Cohan
Teri L Lee
Thomas J Menerey
Thy Tran, AFSP, MAcc
Tosha A Lowery, AFSP
Wanda J Small, AFSP
Zakiyah Ballard

The Impact of Increasing Regulations on the Tax Professional Profession

Produced with the help of ChatGPT

Increasing regulations can have several impacts on the tax professional profession:

Increased Compliance Burden: Tax professionals may face a heavier workload due to more complex regulations, requiring them to spend more time researching, interpreting, and implementing new rules. This can lead to increased costs for clients and potentially longer processing times for tax returns.

Specialization and Training: As regulations become more intricate, tax professionals may need to specialize further or undergo additional training to stay abreast of changes. This could create a barrier to entry for new professionals and necessitate ongoing professional development for existing practitioners.

Risk of Non-Compliance: The stakes for non-compliance can rise with more stringent regulations, exposing tax professionals to greater legal and reputational risks if errors are made. This may lead to increased scrutiny from regulatory bodies and potential penalties for mistakes.

Technological Investment: Meeting regulatory requirements often involves adopting new technologies and software tools to ensure accuracy and efficiency. This can require financial investments in technology infrastructure and training for staff.

Client Relations and Trust: Clients may rely more heavily on tax professionals for guidance and assurance in navigating complex regulations. Building and maintaining client trust becomes crucial as they expect accurate and timely advice.

Impact on Small Firms and Solo Practitioners: Smaller firms and solo practitioners may face greater challenges in keeping up with regulatory changes compared to larger firms with more resources and specialized departments. This could potentially lead to consolidation within the industry.

Industry Advocacy and Influence: Tax professionals may become more involved in advocacy efforts to shape regulatory policies that impact their profession and clients. This could include participating in industry associations, lobbying efforts, and policy discussions.

The challenge that our profession faces is that, given these facts, qualified people are choosing to leave the profession and today's students view these issues as reasons for not pursuing careers in Tax and Accounting. Overall, while increased regulations aim to enhance transparency and fairness in tax practices, they also pose challenges and opportunities for tax professionals, certainly changing the landscape of our profession over time.