

**SUNSHINE STATE REPORTER**  
**YOUR FLORIDA CHAPTER NEWSLETTER**  
**DECEMBER 21, 2021**



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NOTES FROM NOVEMBER

We had an excellent turnout for our Crystal River conference. While the weather outside was not exactly frightful, it was much warmer inside where our intellects were stimulated by the vast amount of tax information (textbook and anecdotal) presented by Beanna Whitlock, EA, our speaker. See conference pictures on pages 7-9 taken by Laura Wood, Chapter VP.

2022 UPCOMING EVENTS

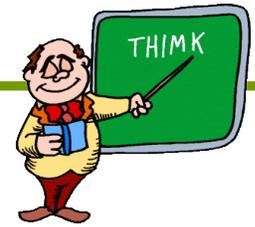
- ♦ JANUARY 7— DAYTONA WORKSHOP  
(See pages 2—6 for details, registration)
- ♦ MAY 15-17— SPRING CONFERENCE  
DAYTONA BEACH SHORES RESORT
- ♦ NOV. 6-8 —FALL CONFERENCE  
PLANTATION INN, CRYSTAL RIVER



2023: WHAT WE'RE WORKING ON

January workshop, Spring conference and a November cruise conference.

## JANUARY 7, 2022 TAX WORKSHOP



This is a one-day in person workshop for 7 hours CE.

**WHERE:** Daytona State College located at 1200 W. International Speedway Blvd. Classes will be in the L. Gale Lemerand Student Center. This is Building 115 on a campus map. We'll be in Room 119. The College has advised that all attendees must wear a face covering when in the building.

**REGISTRATION:** Limited to 48 attendees due to COVID social distancing that the College must comply with, so please send in your registration form as soon as possible. Workshop registration deadline is **12/31/21**. We will not be able to accommodate walk-up registrations.

**REGISTRATION FEES:** \$90 NATP members; \$110 non-members. See the registration form on page 3. You can also download it from our web site: [www.flnatp.com](http://www.flnatp.com)

**GROUP HOTEL:** The Chapter was unable to acquire a group hotel price and room commitment. It was learned that a large insurance conference had already booked most of the rooms in hotels near DSC.



**WORKSHOP REGISTRATION FORM**  
**JANUARY 7, 2022**  
**DAYTONA BEACH, FLORIDA**



**PLEASE PRINT CLEARLY IN BLACK INK OR TYPE.**

Name: \_\_\_\_\_

Professional Designation: EA \_\_\_\_\_ CPA \_\_\_\_\_ ATTY \_\_\_\_\_ Other (specify) \_\_\_\_\_

PTIN (required) \_\_\_\_\_ NATP Member # \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

EMAIL: (required) \_\_\_\_\_ Phone \_\_\_\_\_

Emergency Contact Name & Phone \_\_\_\_\_

**WORKSHOP FEES:**

Member \$ 90 Non-Member: \$110

**No registrations accepted after December 31, 2021.**

**GOING GREEN:** Your course materials will be sent to you by email in pdf format on JAN 3, 2022.

**PAYMENT METHODS**

We accept: Visa, MC, AMEX and Discover cards. Make checks payable to Florida Chapter NATP.

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

CC# \_\_\_\_\_ Exp Date: \_\_\_\_\_ Security Code \_\_\_\_\_

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

**HOW TO REGISTER**

**(MAIL, EMAIL OR FAX)**

Mail to: Florida Chapter NATP, Sandra Torrence, EA, P. O. Box 2280, New Smyrna Beach, FL. 32170

Phone: 386-423-7771 EMAIL: confidential1227@aol.com FAX: 386-423-3744

Note—Email does not go to a secure site. Please call me with your credit card information or send a fax.

**Cancellation Policy:** To cancel your registration, notify Sandra Torrence, at confidential1227@aol.com no later than **DEC. 31, 2021** to receive a refund. Cancellation fee is \$50. No refunds will be granted after JAN 1, 2022 unless due to extreme circumstances (Covid-19, family death, hospitalization, federally declared disaster area, for example) No-shows will not be granted refunds. Registration substitutions are accepted, provided payment for any difference in

## **SPEAKERS AND TOPICS**

Decisions, Decisions—The Best Strategies For Resolving IRS Problems. (2 hours CE) Presented virtually by Tax Attorney Steven Klitzner

The IRS wants to speak to your client. What do you recommend? The IRS wants your client to extend the Assessment Status of Limitations on an audit. What do you do? Your client has the right to request a Collection Due Process or Equivalent Hearing. Which do you choose? There are best practices and there are exceptions to every rule. Knowing the reasoning that guides collection and audit case decisions is critical to the professional as the architect of the taxpayer's defense plan. Attorney Klitzner will illustrate how to examine the facts and circumstances to make the best decisions on your tax resolution cases. He will take you step by step through the tools and strategies to get the best results for your clients.

Annual Tax Update (3 hours CE) Presented by Ken Dowdall, EA

This course assists the tax preparer in getting ready for the 2022 filing season. You'll become familiar with the 2021 tax laws and new developments, including tax laws passed as part of the *Consolidated Appropriations Act, 2021*, *American Rescue Plan Act* and other COVID-19 relief related legislation.

Issues of Divorce (2 hours CE) Presented by Owen Oatley, EA

Divorce can be an emotional rollercoaster for the parties involved. It's your responsibility as the tax preparer to explain the tax implications of divorce and report income and expenses correctly on the individuals' returns. When children are involved, it can be tricky to determine which taxpayer can claim a child for certain tax provisions. Knowing how to distinguish between child support and other payments is required to properly complete the tax return. Being prepared when clients come to you in the midst of a divorce can alleviate tax filing problems.

## WHO IS STEVEN KLITZNER?

Steven N. Klitzner is a Miami attorney who practices exclusively in the area of IRS Problem Resolution. A 1979 graduate of the University of Miami School of Law, he has been a solo practitioner since 1993.

Steve is admitted to the United States Supreme Court, United States Tax Court, United States Court of Appeal for the Eleventh Circuit, and the United States District Court for the Southern District of Florida. He has been awarded an AV rating by Martindale-Hubbell Law Directory, the highest rating of the publication, and a 10.0 rating by Avvo. He also has been selected as an outstanding attorney by Super Lawyers.

In 2021, Steve was appointed to a three year term with the IRS Advisory Council (IRSAC). The IRSAC presents an annual report of recommendations to the Commissioner of Internal Revenue. As a advisory body designed to focus on broad policy matters, the IRSAC proposes enhancements to IRS operations, recommends administrative and policy changes to improve taxpayer service, compliance and tax administration and conveys the public's perception of professional standards and best practices for tax professionals.

He is a charter member of the American Society of Tax Problem Solvers, a member of its Continuing Professional Education Committee and a recipient of the organization's Top Practitioner Award. He is a member of the Advisory Board and Consulting Member of the Tax Freedom Institute, an association of tax professionals in defense of taxpayer rights.



## WHO ARE KEN AND OWEN?

### KEN DOWDALL, EA

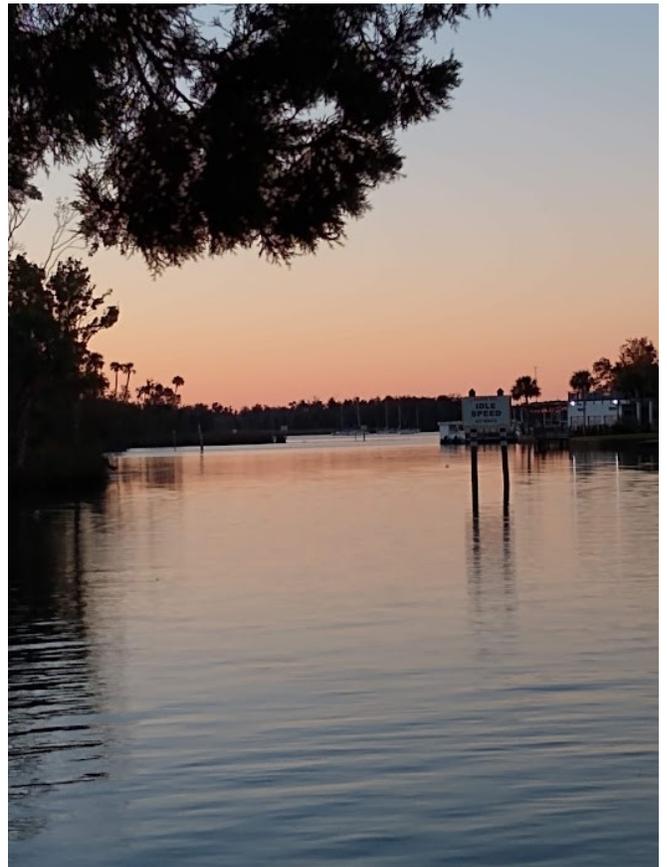
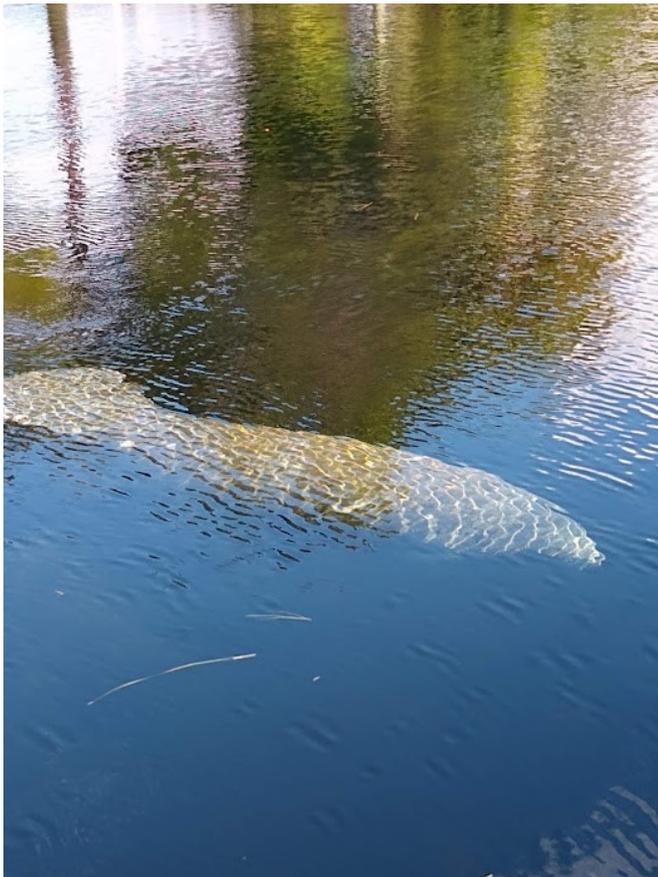
Educated at the University of Pennsylvania where he received two Bachelors and a Masters degree simultaneously, Ken began his career at Citibank in back office operations in New York City. After three cross-country relocations ending in Florida, Ken found his family too settled to answer the call for a fourth move. In 1998 Ken joined his father's small, family owned tax practice and in 1999 after his father retired, Ken and his wife, Donna, took over the business. Twenty plus years later retirement beckoned and in the past year Ken sold off 95% of his business and is now "semi-retired". Ken has been a member of NATP since 1998 and has been on the Florida Chapter Board since May of 2000. He has held the positions of Secretary, Vice President and President. Ken became an EA in 2005 and currently serves as Chair of our Nominations Committee. He has been an NATP certified instructor since 2010.

### OWEN OATLEY, EA

Owen is an EA practicing in Daytona Beach. He is a past President of our Chapter and is a past member of the Taxpayer Advocacy Panel which is a Federal Advisory Board. Before he started his own practice, he was employed by the IRS. He has a Master's degree in political science from FSU. In May, 2006 he was the NATP Member of the Month. Owen is an NATP certified instructor.



Plantation Inn conference room. Where are you?



Yes, this is a Manatee (aka sea cow). Crystal River is famed as a location where you can swim with them. While it was cold, there were still lovely sunsets to see.



Our Scholarship Fund raffle table. .



The conference room was filled almost to overflowing.



From left: Judy White, EA, Board director and Sandra Torrence, EA, Treasurer, discuss tax issues with Beanna Whitlock, EA, conference speaker. At the table is Doris Dimon, EA, Secretary, helping an attendee.



## FEEDBACK, FACEBOOK, QUICKFINDER & THE TAXBOOK

### We Want Your Feedback

This is your newsletter and we would like to meet your wants and needs. Our primary objective is to inform members about happenings in the Chapter, but we like to include other information. If you have any suggestions for what to include in the newsletter or other changes, let us know. E-mail me, Sandra Torrence, at [confidential1227@aol.com](mailto:confidential1227@aol.com). We don't promise to implement every idea you send us, but we do promise to evaluate each submission.



### Our Facebook Page—Are You a Member?

Our Facebook Page is a valuable tool for two-way information exchange and getting to know other members. The more members we have participating, the better the page will be. Feel free to post tax questions, tax practice, tax tips, tax news, humorous tax-related stories, and the like. We welcome your participation, but please remember that this is a TAX page. There are plenty of other pages that will provide political and other news, so please keep it tax-related. Also, this is not a place to advertise your business. Help wanted or seeking employment posts are acceptable.

Find us on Facebook at Florida Chapter, National Association Of Tax Professionals. We are now up to 448 members. On the way to 500. But more than numbers, this is becoming an active page for questions and information. Thanks to all our members, new and old, who are contributing to the discussion on this page. Of our 448 members 275 are active, so I would encourage the rest of you to get active and if you're not a member, join the group.

We also have a webpage where you can read our newsletter and obtain other information about the Chapter. [www.flnatp.com](http://www.flnatp.com). We are exploring moving into additional social media platforms.

And don't forget the NATP National website. [www.natptax.com](http://www.natptax.com) where you can find out what's happening on the national level.

### QUICKFINDER & THE TAX BOOK DISCOUNTS

#### ORDER NOW

**QUICKFINDER**—A new faster and easier way to order your discounted Quickfinder products. Simply visit [tax.tr.com/NATP](http://tax.tr.com/NATP) and select the Quickfinder products in the quantity and format you'd like, add them to your cart and checkout with your credit card. Your association discount, sales tax and shipping fees are all calculated automatically! You can also call 800-510-8997 and use discount code Q680.

**THE TAX BOOK**—Please use our Group Promo Code available on our website when ordering your Tax Book(s). The Chapter receives \$5 for each copy of The Tax Book you order and \$10 for each Web Library purchased. Discounts depend on products ordered and quantity. Order online at: [thetaxbook.com/order](http://thetaxbook.com/order) or by phone at 866-919-5277.