



2023-2024

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DAYTONA JANUARY 5TH WORKSHOP

BOOK NOW

EARLY BIRD DEADLINE: DEC. 20

NEW LOCATION

Fairfield by Marriott at One Daytona

NEW SPEAKERS AND TOPICS

Brad Messner, Jeremy Wells, Amy Brosnan

MORE EDUCATION—8 HOURS CPE



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SPEAKERS AND TOPICS

JEREMY WELLS, EA, CPA

TAX-BASIS RECORD KEEPING: RETURN PREPARER RESPONSIBILITIES AND OPPORTUNITIES (2 HRS CE)

Federal tax law imposes record keeping requirements on business owners to ensure accurate tax return reporting and proper substantiation of income and expenses. This course provides an overview of those requirements and how tax professionals can help businesses meet those requirements without becoming bookkeepers. We will discuss book to tax adjustments needed opportunities to provide additional services to help them maintain accurate books and records.

AMY BROSNAN, EA, NTPI FELLOW

IRS AND THE TAX OFFICE (2 HRS CE)

This class is about the many obligations that the IRS requires of a Tax Office. The WISP is not the only obligation that Tax Professionals must face. This class will cover the multiple publications that the IRS releases for document retention, document storage, document destruction, due diligence and what obligations a Tax Office has to their clients. The IRS has a lot to say about how Tax Professionals run their offices and this class will help make those requirements clear.

SPEAKERS AND TOPICS

BRAD MESSNER, EA, MBA, CSBA (Certified Small Business Analyst)

ALL OF MR. MESSNER'S CLASSES ARE VIRTUAL PRESENTATIONS AND WILL INCLUDE A QUESTION AND ANSWER PERIOD.

CYBERSECURITY FOR TAX PROFESSIONALS (2 hrs CE)

Locking down and securing your digital assets and information is no longer a suggestion; it is now a requirement. Is your firm in compliance with data protecting but also insurance requirements? Do you have a properly set up and deployed security plan? We will be discussing both cybersecurity-related concerns as well as reviewing the recently released WISP draft by the IRS. We will also be discussing known threats and potential protective answers.

ID THEFT WARNING SIGNS (1 hr CE)

Many of us have received that phone call from a client worried about identity theft or that dreaded R0000-194 Rejection Code. We will design a plan to investigate potential fraud or identity theft and steps to resolve including when a taxpayer may need to obtain an IP PIN file a police report, or obtain identity monitoring services. Because identity theft can work on both sides we will also review what steps you should take as a preparer and business owner to protect yourself and your identity.

DETECTING AND RESPONDING TO A DATA BREACH (1 hr CE)

With over 40% of small businesses projected to experience a breach this year, having a plan in place and being ready to respond quickly to mitigate risks is critical. Not only that, but having an emergency response plan is on of the updated FTC Safeguard Requirements. A checklist, and editable plan, and a response workflow will be provided to all participants.



**2024 JANUARY DAYTONA WORKSHOP
FAIRFIELD INN & SUITES
JANUARY 5TH REGISTRATION FORM**

PLEASE PRINT CLEARLY. YOUR NAME MUST MATCH YOUR PTIN LISTING.

Name: _____

Professional Designation: EA _____ CPA _____ ATTY _____ Other (specify) _____

PTIN (required) _____ NATP Member # (required for discount) _____

Address: _____

City: _____ State _____ ZIP _____

EMAIL: (required) _____ Phone _____

Emergency Contact (not at the conference) Name _____

Phone # _____

REGISTRATION FEE: **\$145 Members** **\$175 Non-members** **Early Bird Deadline: DEC 20**

\$170 Members **\$200 Non-Members** **Final Registration Deadline: DEC 27**

GOING GREEN: Your course materials and agenda will be sent to you by email in pdf format on **DEC 30.**

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: _____ ZIP Code: _____

Questions about the conference in general, please contact:

Laura Wood, EA—VP and Education Chair at laura@namsinc.net or 407--869-5766 or on our Chapter Facebook page, Florida Chapter, National Association of Tax Professionals

Questions regarding the registration only, contact Sandra Torrence, EA at 386-423-7771. or

confidential1227@aol.com.

HOW TO REGISTER

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

Fax: 386-423-3744 EMAIL: confidential1227@aol.com (not a secure site-call Sandra w/cc number.)

Cancellation Policy: To cancel your registration, notify Sandra Torrence, at confidential1227@aol.com no later than **DEC 27** to receive a refund. Cancellation fee is \$50. No refunds will be granted after that date 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 membership is paid.



2024 DAYTONA CONFERENCE

FRIDAY JANUARY 5TH

AGENDA

FIREBIRD ROOM

PLEASE DO NOT ARRIVE BEFORE REGISTRATION OPENS.

FRIDAY JANUARY 5TH

8 HOURS CPE

8:00—8:30 AM	Registration, Continental Breakfast	
8:30—10:10 AM	Tax Basis Record Keeping Jeremy Wells, EA CPA	2 hrs CE
10:10—10:25 AM	Mid-morning Break (Light refreshments)	
10:25—12:05 PM	Cybersecurity for Tax Professionals (Live Virtual presentation)* Brad Messner, EA, MBA, CSBA	2 hrs CE
12:05—1:15 PM	Lunch (on your own)	
1:15—2:55 PM	ID Theft Warning Signs Detecting and Responding To a Data Breach (Live Virtual presentation)* Brad Messner, EA, MBA, CSBA	1 hr CE 1 hr CE
2:55—3:10 PM	Afternoon Break (Light refreshments)	
3:10—4:50 PM	IRS and the Tax Office Amy Brosnan, EA, NTPI Fellow	2 hrs CE

**All virtual presentations include Q&A*

HOTEL INFORMATION
FARIFIELD BY MARIOTT
1820 CHECKERED FLAG BLVD
DAYTONA, FLORIDA 32114

GROUP ROOM RATE IS \$124. BOOKING CLOSES ON DEC 16.

RATE IS GOOD FOR TWO DAYS BEFORE AND AFTER THE WORKSHOP.

WEBSITE: <https://www.marriott.com/event-reservations/reservation-link.mi?id=1695047073776&key=GRP&app=resvlink>

PHONE: 386-254-4700

UPCOMING NETWORKING MEETINGS

THE PASCO GROUP will now meet on the second Tuesday of each month, starting DEC 12th at the IHOP Restaurant, SR 54, Trinity FL at 6 PM.

THE PINELLAS GROUP will now meet on the third Tuesday of each month, starting DEC 19th at the Bob Evan's Restaurant, 2183 Gulf-To-Bay Blvd, Clearwater, FL at 6 PM.

RSVP to Robert Ferreira, EA. Cell: 401-595-8127 or bob.april15@gmail.com

CONFERENCE MATERIALS: PDF files will be sent to your email address on DEC. 30th.

REMINDERS: The usual cautions apply about wearing layered clothing due to varying room temperatures. No smoking, use of e-cigarettes or use of recording devices is permitted in the classroom.

JOHN & BIBI RUDESTEDT
CHAPTER GROWTH SCHOLARSHIP

Qualifications for the Scholarship

- The scholarship award is a free Registration specifically for a Florida NATP conference. We will award ONE scholarship for the January workshop.
- Membership in NATP is not required. An applicant, however, must never have attended a Florida NATP conference. Members include your number below.
- All applicants must have a valid PTIN number.
- Application deadline for the upcoming conference is **DEC 20TH.**
- Registration winner will be drawn on DEC 21ST. The winner will be notified via e-mail and in an at-large Chapter email.
- To enter: E-mail your completed application to: Doris Demon, Scholarship Committee Chair at doris.dimon@gmail.com or mail it to her at Harbor Bookkeeping & Tax Preparation, Inc., 2807 Wesleyan Dr., Palm Harbor, FL 34684.

APPLICATION

Name: _____

NATP Member #: _____ PTIN: _____

Address: _____

City, _____ State _____, Zip: _____

Phone: _____ Fax: _____

E-mail: _____

Please tell us about yourself, including the number of years in the tax profession and any credentials. _____

Explain why you feel you should be chosen for the Scholarship:



SAVE THE DATE
UPCOMING EVENTS

ANNUAL SPRING 3-DAY CONFERENCE
DAYTONA BEACH SHORES RESORT & SPA
MAY 5—7, 2024

SEMINAR AT SEA
RCCL WONDER OF THE SEAS
NOV 10-17, 2024
BOOK NOW—DETAILS ON OUR
WEBSITE: WWW.FLNATP.COM

2025
DAYTONA WORKSHOP
JANUARY 3, 2025
LOCATION DETAILS TBA

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 have exceeded **600** members. 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 over 600 members most are active, so I would encourage those of you who are not, to become involved and if you're not a member, join the group.

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 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 or by phone at 866-919-5277.



JUDY WHITE, Social Events Director



DISCO PARTY RAFFLE WINNERS

MANAL OLIVER, CHARLOTTE DAVIS, HOSTESS JUDY WHITE,
ELAINE BRAGA AND JEAN BRANDT.





Front row: CONFERENCE SPEAKER, TOM GORCZYNSKI, SECRETARY DORIS DIMON, DIRECTOR KEN DOWDALL, DIRECTOR NANCY ANDERSON.

Back row: DIRECTOR JUDY WHITE, VP LAURA WOOD, PRESIDENT AMY BROSNAN, DIRECTOR JEREMY WELLS

DANCING—DONNA & KEN
DOWDALL



LAURA WOOD, VP
AND MARK
MILLER, DIRECTOR

CAN YOU HEAR THE
MUSIC?



DID YOU DISCO?