

PA-NATP NEWS



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Volume 35, Issue 1

Board of Directors

Executive Committee

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724-763-3049
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Joyce Jones, EA
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President's Message

Summer is here and while taxes have slowed a bit, extensions still are on my desk waiting their turn to be completed. It's hard some days to be in the office when you just want to soak up the sunshine and enjoy the long days.

We had another wonderful turnout at our annual conference in October with lots of great education and a chance to renew old friendships and make new ones.

We said many thanks to retiring board member Paul Pascuzzi. We elected new 2023 Board Director Rebecca Naylor, and returning Directors Patti Blum, Charles Evans, Jr, Vicki Ziegler, and David Luczak. The Officers installed for 2023 are Holly Whiteside -President, Troy Clawson -Vice-President, Joyce Jones-Secretary, and Susan Bure-Treasurer.

Chuck Evans was given the Chapter Award of Excellence at the annual conference. Many thanks for all your hard work and dedication to the PA Chapter!

We are working hard on planning the conference for 2023! Our dates for the annual conference and member meeting are November 13th and 14th at the Best Western Premier Hotel and Conference Center in Harrisburg. We hope you will be able to join us!

Wishing all of you a very enjoyable summer! See you in the fall!

Holly Whiteside, EA
President PA-NATP

"Adding the Value of State & Local Benefits to the Power of your National Membership"

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.

2023 PA-NATP Board of Directors

Holly Whiteside, EA (24) President Warfordsburg, PA 717-294-6659 mytaxbiz@live.com	Troy Clawson (24) Vice President Youngsville, PA 814-563-7047 taxpro@tmctax.com	Joyce Jones, EA (23) Secretary New Castle, PA 724-924-9722 joycejones@zoominternet.net
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Charles C. Evans, Jr (25) Downingtown, PA 610-873-2073 evansjrc@verizon.net	Rebeca Naylor, EA (25) Turtlepoint, PA 814-596-6131 hallomudder@gmail.com	David Luczak, EA (25) Pittsburgh, PA 412-349-8744 DLuczak@Pallastax.com
Vicki Ziegler (25) New Castle, PA 724-657-0047 vicshaffer@gmail.com		Rev 10/24/2022

(xx) indicates year term will expire

2023 PA NATP Committee Members

AUDIT

Vicki Ziegler
Susan Bure

AWARDS

Charles Evans - Chair
Joyce Jones

BUDGET

Executive Committee

BYLAWS

Susan Bure- Chair
Holly Whiteside
Rebecca Naylor
Troy Clawson

EDUCATION

Walter Douglass - Chair
Holly Whiteside
Troy Clawson
Patti Blum
Helen P. O'Planick
David Luczak

MEMBERSHIP

Mary Lynn Lemmon - Chair

NEWSLETTER/COMMUNICATIONS

Mary Lynn Lemmon - Editor
Joyce Jones – Proofreader

NOMINATIONS

Patti Blum
Rebecca Naylor

PUBLIC RELATIONS/WEBSITE/FACEBOOK

Walter Douglass - Website
Patti Blum - Facebook
Mary Lynn Lemmon
Helen P. O'Planick

WEBINAR COMMITTEE

Walter Douglass - Chair
Holly Whiteside
Troy Clawson
Patti Blum

SCHOLARSHIP FUND

Joyce Jones - Chairperson
Susan Bure
Troy Clawson
Patti Blum

SEMINARS & EVENTS

National Conference

Walter Douglass
Patti Blum

Working Together - East

Chuck Evans

Working Together - West

Patti Blum
David Luczak

PA/Local Line by Line

Patti Blum
Helen P. O'Planick

Annual Conference – State College

Holly Whiteside – Co-Chair
Patti Blum – Co-Chair
Chuck Evans
Helen O'Planick
Walter Douglass
Andrea Phillips

TAX PRACTITIONER LIAISONS

IRS – Helen P. O'Planick
PA - David Luczak
Local - Joyce Jones

CHAPTER BETTERMENT

Susan Bure
Rebecca Naylor

2023 Calendar of Events

PA Chapter events in bold type

National events in italics

January 12, (Thursday)	Philadelphia Tax Update Webinar 2pm – 3:30pm EST
January 19, 8:30am (Thursday)	Board of Directors Zoom Meeting
May 11, 8:30am	Board of Directors Zoom Meeting
May-25	East Working Together Penn State Great Valley Conference Center Malvern,
July 12, 8:30am (Wednesday)	Board of Directors Zoom Meeting
<i>July 24 - 26 (Monday-Wednesday)</i>	<i>NATP Taxposium- Grand Hyatt San Antonio, TX</i>
<i>September 18 & 19 (Monday & Tuesday)</i>	<i>NAPT Tax Forum- Hilton Inner Harbor Baltimore, MD</i>
September 27, 8:30am (Wednesday)	Board of Directors Zoom Meeting
September-TBA	West Working Together
<i>October 3 & 4 (Monday & Tuesday)</i>	<i>NATP Tax Forum – Planet Hollywood Las Vegas, NV</i>
<i>October 18 & 19 (Wednesday & Thursday)</i>	<i>NATP Tax Forum – Florida Hotel & Conference Center, Las Vegas, NV</i>
November 12, 4pm-8pm (Sunday)	Board of Directors Meeting Harrisburg, PA
November 13 & 14 (Monday & Tuesday)	Annual State Conference & Membership Meeting Best Western Premier Central Hotel & Conference Center Harrisburg, PA **
<i>December 5-7 Tuesday – Thursday</i>	<i>NATP Tax Con Virtual</i>

****Register**

@<https://www.natptax.com/Chapters/Pages/PennsylvaniaChapterEducation.aspx>

Welcome New Members

The PA Chapter is honored to welcome these new members

Jacqueline M Gleason	Pottstown
Paul L. Baldwin	Orrtanna
Pamela J Carr	Gillett
Jason M Bentley	Erie
Marquita V Bailey	Folcroft
Robert H Rimby	Reading
Eduard V Zolotarev	Philadelphia
Angelina Williams	Philadelphia
Theresa E Lynch	Carlisle
Kimberly Lynch	Murrysville
Leslie Ann Hoover	Spring Mills
John Rump	Lebanon
Lawrence J Robinson-Ray	West Chester
Jessica M Savidge	Spring Grove
Christopher A Ullrich	Hughesville
Amy Urbaniak	Slippery Rock
David Mininger	Quakertown
Richard W Fries	Irwin
Thomas Moore	Mountville
Amy James	Port Allegany
Chester B Holmes, JR	Chester Springs
John Georgiou	East Stroudsburg
Zheng Yang	Harleysville
Nicholas R Camp	Cannonsburg
Shailesh Parikh	Philadelphia
Daniel K Moyer	Allentown
Amos Opata Garsaynee	Secane
Sheldon Martin	Lancaster
Lisa Belmonte	Mountville
Nancy Nicoletto	Bloomsburg
Harry Tillman	West Chester
Shantese Skrine	Pittsburgh
Fred Butler	Allentown
Kristyn Timmerman	Hanover
Sonya Pappas	Swarthmore
Andrew Zimmerman	Mifflintown
Natasha Bank-Pronsati	Dresher
Kimberly Arthur-Tressler	Mechanicsburg
Stephanie Crowell	Phoenixville
Stacy R Stewart	Philadelphia
Katherine M Morrison	Myerstown
Tracy M Giles	Cochranton
Dommonick Chatman	York
Keith Muhammad	Philadelphia

Laura Rose Bracey	New Park
Ellen M Stocker	Easton
Derek Joseph Gano	Bethlehem
Heather Danielle Garber	Holtwood
Jessica Casey	Collegeville
Peter Lawrence Barchetti	Uniontown
Susan M Baum	Loyalhanna
Kristin Rhodes	Towanda
Thomas Mcdevitt	Philadelphia
Rodney Lee Stephan	Reading
Yvonne Johnson	Mount Joy
Kheri Dean Vance	Philadelphia
Donna Croom	Lancaster
M Patricia McKinley	Philadelphia
Vaughn McKinley	Philadelphia
Dan Dorsey	State College
James Jean Coleman	Halifax
Karen N Daubenspeck	Reading
Rachel Jones	Dresher
Steven M Cosentino	Reading
Bradley Ray Gill	Loysville
Derek M Rabold	Myerstown
Nicole A Reaves	Philadelphia
Jessika Hiepler	Lancaster
Kathryn G McCusker	Carlisle
Thomas John Koslosky, Jr	Natrona Heights
Joseph Minor Messalle	Delmont
Daniel Warywoda	Pittsburgh
Joshua Schwartz	Philadelphia
Md Mushahidur Rahman	Philadelphia
Keri Cox Kan	Collingdale
Omar Shariff Emmens	Woodlyn
Thomas Imholte	Carlisle
Donald Burak	Levittown
Heather Findon	Pittsburgh
John Baker	Erie
Michael L Hoover	Washington
Steven Reidenberg	Bensalem
Patrick Rogers	West Chester
Andrey Sapir	Jamison
Heather M Weinheimer	Monongahela
Lester Bahr	Allentown
Paul M Nolt	New Holland

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 education seminars on state and local tax topics at the PA Chapter Annual Conference.
- 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.
- Send news articles that you feel would benefit our members.
- For more information or to contact our Chapter, visit <http://panatptax.com>.

About PA – NATP

Adding the Value of Local Benefits to the Power of your National Membership

The National Association of Tax Professionals (NATP), founded in 1979, is a nonprofit professional association dedicated to excellence in taxation. NATP was formed to serve professionals who work in all areas of tax practice. Members include individual practitioners, enrolled agents, accountants, CPAs, attorneys, and financial planners.

The Pennsylvania Chapter has a great variety of educational opportunities regarding state tax issues and tax practice management. This ranges from informal round table discussions to formal seminars and speakers from the state taxation departments and others. The Pennsylvania Chapter's annual meeting is an opportunity for you to get acquainted with other tax preparers in your state, build a peer network, make new friends as well as have an enjoyable experience. The Pennsylvania Chapter is an excellent opportunity for you to get involved with tax issues at the state level.

Awards Committee

Do you know someone who goes above and beyond in providing tax services? If so let us know.

Send us their name, address and in 30 words or less, why you feel they deserve to be chosen.

Keep in mind they must be a PA-NATP member.

We would like to recognize your nominee at our Annual Chapter Conference in November. Please

forward the info to our Awards Committee chairperson, Charles Evans, Jr. @ evansjrc@verizon.net

Please do not forget to indicate your own name and address. Thank you.

IRS-PA DOR-Local NEWS

- Senior property/Rent rebate filing deadline extended to 12/31. You can file online through myPATH.
- DOR has implemented an updated system to submit documents on-line. Useful when working on audits/Appeals/etc. where large files need to be sent.
- The Board of Appeals has a new registration form (REV-65) to be used when filing on-line appeals.
- myPATH now allows Gambling and Lottery winners in PA to download their W2G from myPATH.
- myPATH now allows tracking of the Inheritance Tax Return (PA 1500).

The Department of Revenue's Customer Experience Center has released a series of Revenue 411 informational videos that provide taxpayers and tax professional with step by step instructions on how to use a variety of features in myPATH

To date, the Revenue 411 video library offer step by step instructions on topics such as:

- myPATH - Making Estimated Payments
- myPATH - Making Extension Payments
- myPATH - Making a Return Payment
- myPATH - Paying a Bill
- myPATH - Responding to a Letter
-

To watch these videos and future step by step instructional videos visit the department's Revenue 411 video Library

Advertising

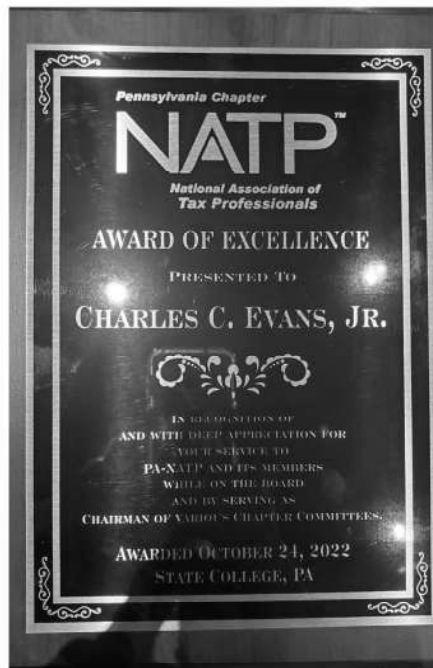
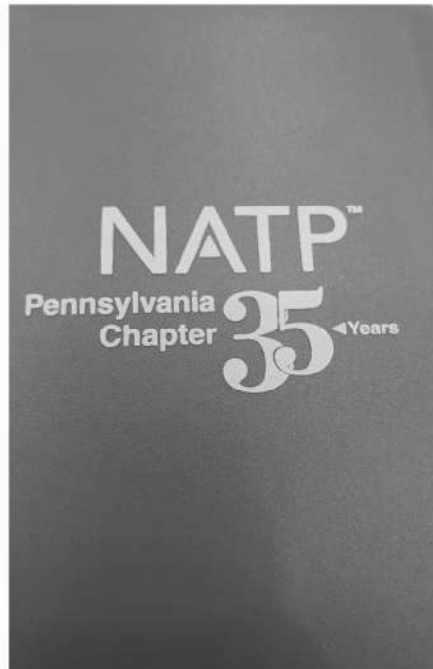
FOR THOSE WHO PREPARE NJ-1040s. I have been preparing NJ-1040s for as long as there has been a NJ-1040. I have written a special report that explains in detail a tax strategy that could legally save your married clients **hundreds to thousands of dollars** in NJ state income tax; and perhaps some federal income tax as well.

I will send this to PA-NATP members for \$5.20 (25% discount) plus \$1.80 postage. See <http://robertdflach.blogspot.com/p/avoid-new-jersey-taxes-legally.html> for more details. Mention PA-NATP when you order to get the discount.

**** Your ad on this page can reach over 1200 PA tax professionals.
See page 11 for more information**

Pictures

Some Pictures from our 2022 Annual Conference



PA NATP Chapter Scholarship Fund

Submitted by Joyce Jones

Hello to all PA-NATP members:

Hope you're enjoying your summer and digging yourselves out of tax extensions. I am sure you are also thinking about fall seminars and attendance costs. Take into consideration our PA-NATP Chapter Scholarship Fund. We currently have about \$3500 available for members who apply for scholarships.

To apply for a scholarship, you must complete the 2023 Scholarship application with the required information. Once completed, send the application to Joyce Jones, Scholarship Committee Chair, at 395 Double J Lane, New Castle, PA 16101. All applications must be received by August 31, 2023. Once received, applications will be reviewed by the committee members who will vote on the winners. The winners will be notified by mail and will receive a Scholarship Disbursement Voucher. The voucher must be returned along with the required information to the committee chairperson who will have the treasurer send you a check for reimbursement.

Good luck with your applications. We hope to see many applications.

PA-NATP Scholarship Application Directions

DEFINITION: A scholarship will be given to any active member of the PA Chapter of National Association of Tax Professional 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

INSTRUCTIONS: Complete PA-NATP Scholarship Application and send to scholarship committee chairperson: Joyce Jones, 395 Double J Lane, New Castle, PA 16101.

ALL APPLICATIONS MUST BE RECEIVED BY AUGUST 31, 2023

If you are chosen as a recipient, you will be notified by mail along with a Scholarship Disbursement Voucher. Attachments needed for reimbursement:

1. Scholarship Disbursement Voucher
2. For Enrolled Agent Testing, a copy of the Prometric receipt when you registered and proof that you took the test.

Send the Scholarship Disbursement Voucher and all attachments to: Joyce Jones, 395 Double J Lane, New Castle, PA 16101

Please note that all scholarships are non-transferable.

PA-NATP 2023 SCHOLARSHIP APPLICATION

NAME: _____

ADDRESS: _____

CITY: _____ STATE: _____ ZIP CODE _____

SCHOLARSHIP FOR WHICH YOU ARE APPLYING: (Pick only one)

- 1 PA-NATP Annual Conference _____
- 2 PA-NATP Seminar Event _____
- 3 Enrolled Agent Test Part 1 _____
- 4 Enrolled Agent Test Part 2 _____
- 5 Enrolled Agent Test Part 3 _____

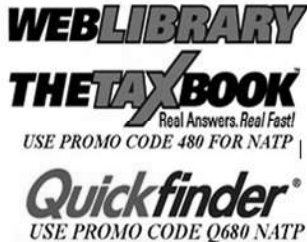
Explain why you want to attend the event chosen from the above list.

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 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 the 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.

PA-NATP NEWS Advertising Space Available

****Your ad on these pages can reach 1200 PA tax professionals.**

Classified Ad Rates

NATP Member rates, up to 100 words:

- 1 Issue \$20.00
- 2 Issues, same ad \$30.00
- 3 Issues, same ad \$40.00
- 4 Issues, same ad \$50.00

Additional words flat rate 50¢ per word for 1- 4 issues, member and nonmember.

Non-Member rates, up to 100 words:

- 1 Issue \$30.00
- 2 Issues, same ad \$45.00
- 3 Issues, same ad \$60.00
- 4 Issues, same ad \$75.00

Display Ad Rates

NATP Member rates:

- Full page \$150.00
- Half page \$85.00
- Quarter page \$50.00

Non-Member rates:

- Full page \$225.00
- Half page \$125.00
- Quarter page \$75.00

All ads must be prepaid and be tax/accounting/financial planning oriented.

Please send your ad and check, made payable to PA-NATP, to the newsletter editor:

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16128 Rt 119 Hwy N
Rochester Mills, PA 15771

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724-286-9771

