



www.panatptax.com
panatptax@gmail.com



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January 2022

Board of Directors

Executive Committee

President

Holly Whiteside, EA
717-294-6659
mytaxbiz@live.com

Vice President

Troy Clawson
814-563-7047
taxpro@tmctax.com

Treasurer

Sue E. Bure, AFSP
724-763-3049
accountingbysue@windstream.net

Secretary

Joyce Jones, EA
724-924-9722
joycejones@zoominternet.net

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President's Message

Happy New Year

Tax Season 2022 has officially begun with tax pros putting the final touches to their offices, stocking up on last minute supplies, and reviewing tax updates. It looks to be another year of changes and challenges for us all.

We had a wonderful turnout at our annual conference in November with lots of great education and a chance to renew old friendships and make new ones. We are already working on planning the conference for 2022!

We said many thanks to retiring board member Marianne Kleppner. We elected new 2022 Board Director Helen O'Planick, and returning Directors Holly Whiteside, Mary Lynn Lemmon and Troy Clawson. The Officers installed for 2022 are Holly Whiteside -President, Troy Clawson -Vice-President, Joyce Jones-Secretary, and Susan Bure-Treasurer.

The Board would like to recognize Linda Bleil for her excellent training and wish her the best as she moves into retirement. We would also like to recognize Kathryn Bowman and Sam Wingard -former Board members who are planning to retire after the 2022 Season. Many, many thanks for all of your hard work and dedication to the PA Chapter! We will certainly miss seeing you!

Wishing all of you a very prosperous tax season!

Holly Whiteside, EA

President PA-NATP

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.

2022 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
Susan E. Bure, AFSP (23) Treasurer Manorville, PA 724-763-3049 accountingbysue@windstream.net	Walter Douglass, EA (23) Schwenksville, PA 610-246-5724 walter.douglass@gmail.com	Andrea Basalyga-Phillips, EA (23) Nicholson, PA 570-466-3195 abp1@epix.net
Patti Blum (22) Sheffield, PA 814-968-5919 widders5@windstream.net	Charles C. Evans, Jr (22) Downingtown, PA 610-873-2073 evansjrc@verizon.net	Paul Pascuzzi, EA, MBA (22) Clarendon, PA 814-723-1088 paul@taxcuzzi.com
David Luczak, EA (22) Pittsburgh, PA 412-680-8572 dluczak@Pallastax.com	Vicki Ziegler (22) New Castle, PA 724-657-0047 vicshaffer@gmail.com	Mary Lynn Lemmon, AFSP (24) Marchand, PA 724-286-9771 mll.panatp@gmail.com
Helen P. O'Planick (24) Manchester, PA 717-266-5828 heljungal@aol.com		Rev 1/12/2022

(xx) indicates year term will expire

2022 PA NATP Committee Members

AUDIT

Vicki Ziegler
Susan Bure

AWARDS

Charles Evans - Chair
Joyce Jones

BUDGET

Executive Committee

BYLAWS

Paul Pascuzzi - Chair
Susan Bure

EDUCATION

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

MEMBERSHIP

Mary Lynn Lemmon - Chair

NEWSLETTER/COMMUNICATIONS

Mary Lynn Lemmon - Editor
Joyce Jones - Proofreader

NOMINATIONS

Susan Bure - Chair

PUBLIC RELATIONS/WEBSITE/FACEBOOK

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

WEBINAR COMMITTEE

Walter Douglass - Chair
Holly Whiteside
Troy Clawson
Patti Blum

CHAPTER BETTERMENT

Susan Bure

SCHOLARSHIP FUND

Joyce Jones - Chair
Susan Bure
Patti Blum
Troy Clawson

SEMINARS & EVENTS

National Conference

Patti Blum
Walter Douglass

East Working Together

Chuck Evans

West Working Together

Patti Blum - Site Coordinator
David Luczak

PA/Local

Patti Blum
Helen P. O'Planick

Annual Conference

Holly Whiteside – Site Coordinator

TAX PRACTITIONER LIAISONS

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

WEBSITE

Walter Douglass - Chair

2022 Calendar of Events

PA Chapter events in bold type
National events in italics

January 12, 8:30am (Wednesday)	Board of Director Zoom Meeting
May 12, 8:30 (Thursday)	Board of Director Zoom Meeting
May-TBA	East Working Together
July 13, 8:30am (Wednesday)	Board of Director Zoom Meeting
<i>July 24 - 28 (Sunday-Thursday)</i>	<i>National Conference Las Vegas, NV</i>
September 14, 8:30am (Wednesday)	Board of Director Zoom Meeting
September-TBA	West Working Together
<i>September 19 & 20 (Monday & Tuesday)</i>	<i>Tax Forum Orlando, FL</i>
<i>September 29 & 30 (Thursday & Friday)</i>	<i>Tax forum Atlantic City, NJ</i>
<i>October 19 & 20 (Wednesday & Thursday)</i>	<i>Tax forum Las Vegas, NV</i>
November 13, 4pm-8pm (Sunday)	Board of Directors Meeting TBA
November 14 & 15 (Monday & Tuesday)	Annual State Conference & Membership Meeting TBA

Welcome New Members

The PA Chapter is honored to welcome these new members

September 2021

Kimberly Stutzman	Williamsport
Paul R Jones	Mechanicsburg
Ernest Michael Booker	New Freedom
Ali Uqdah	Norristown
Victoria Lackovic	Silverdale
Alicia M Jones	Easton
Brandon Adamson	Lancaster
Heather L Imes	Honey Grove
Cutter J Smotherman	Annville
Terry O'Connor	Pittsburgh
Jacob D Gruver	Mansfield
Lacey Coleman	Somerset
Tammy Marlene Chronister	Bellefonte
Beverly Ann Mitchell	Pittsburgh
Bennett Lee Hoover	Garrett
Ian T Scott	Philadelphia
Megan Gerhart	Nazareth
Gary Vassalotti	Duncansville

October 2021

Courtney Harris	Selinsgrove
Nina Ostrofsky	Levittown
Donna Barnish	Perkasie
Chad McCollum	Lansdowne
Tracey V Fortuna	Ford City
Maria Groff	Easton
Leticia Cipparone	Pennsburg
Zakaria Elabid	Ardmore
Alison Rae Wegley	Cheswick
James J Sorris	Bethlehem
Margaret Anne Ross	Tobyhanna
Amanda L Phillips	Pittsburgh
Asif Malik	Elkins Park
Pamela Reel	Airville
Tara Manotti	Columba

November 2021

Brandon Redome	State College
Dustin George Torrey	Genesee
Kara Talarico	Erie
Constantinos Pappas	Swarthmore
William John Roth, III	Warrington
Marissa Healy	NatronaHeights
Janice Hunter	Monroeville
Fonshell Ragsdale	Collingdale
Antonio Cortes Jr	Kunkletown
Kenneth Cauthorn	Pittsburgh
Joi M King	Philadelphia
Stacey J Winslow	Chicora
Curtis S Guthrie	Brownsville
Jennifer Schmidt	Fredericktown
Sarah Eichenlaub	Mifflinburg
Edward Peter Caine	Bryn Mawr
Joseph Chajko	Phoenixville
Latoya King	Dresher
Craig Whitney	Bryn Mawr
JacquINETTE Sales	NatronaHeights
Anna A Caramuche	Allentown
Predrag Novkovic	Havertown
Dayciri Dionisha Dominguez	Allentown

December 2021

Geralee R Forrest	Harrisburg
Lorenzo S Scalora	Wallingford
Rosalyn Toler	Trainer
Belinda Kent	Carnegie
Michele Dolan	Philadelphia
Pamela Surma	Mechanicsburg
Barbara OConnell	Stroudsburg
Akshay Thakar	Lansdale
Sarah A Meyers	Chambersburg
Susan Johnsson	Ambler
David Edmund Yearing	Pipersville
Karen M Mele	Erie
Christi Bemder	Phoenixville
Mary Dylewski	Erie
Norma J Jones	Erie
Adele Stevens	Colmar
Daphne Hancock	Monaca
Emily R Valentine	Camp Hill
Jane Anna Monica Benjamin	Bethlehem
Robert Kollar	Bridgeville
Anne Lee Kelly	Pittsburgh

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 in November.
- 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>.

Sharing some Congrats, News & Updates



PA-NATP would like to recognize some of the founders of our PA-NATP Chapter Denise Brandt, Jeffrey Cohick, Linda Bleil, Penny Erbe, and Kathryn McCuster.

PA NATP
Birth Years
By
Denise E Brandt, EA

Being involved in forming our State Chapter for NATP was probably the best task I took on for my business and personal growth. I met the most wonderful professionals who taught me more than what I ever expected. Let me start from the beginning. I am withholding names to protect the innocent. :)

I started my tax preparation business back in 1984 planning on only preparing Form 1040 returns. I knew a lot of people who needed help at understanding simple tax law along with friends who owned small businesses, no employees, low inventory, etc. I joined NATP in 1986 to gain knowledge and stay on top of personal income tax law. San Francisco was the second NATP national conference that I attended and my first full conference. I was confronted in the hotel elevator by another PA NATP member who asked if I would help, along with others, to organize the PA Chapter of NATP. I told this person I did not have experience at organizing chapters, let alone be involved in a tax organization. Therefore, I felt I could not help him. Plus, I had zero time available. Well, this person helps me hostage in the elevator until I told him I would attend the organizational meeting of the PA-NATP chapter. Best business decision I ever made!

I was scared the day of the meeting, not knowing what I was to do. Between the national representatives and the other formidable tax professionals who attended the organizational meeting, it was very educational, and the tasks were accomplished by every single person who attended. Everyone gave input. I served on the committee that broke PA into regions or districts. To all the current and prior board members I apologize. All we wanted to do was give each region with the Commonwealth of PA equal member representation to our chapter. If I would have had a crystal ball back then, looking into 2020, and knowing then what I know now, I probably would have suggested four regions: western side, eastern side, and the rest into two separate regions. Strategic planning committees are so awesome!

Through my experience, I met the greatest tax pros in PA. Strange part: I was nominated to serve as the first vice-president of the chapter and I accepted the nomination. From that point on, it was the best learning experience I ever had and I appreciate it. I am truly thankful for the person who held me hostage in the elevator in San Francisco.

Board meetings back then were normally held in a corner of a restaurant or side room if available. They usually lasted a full day. We did not have conference calls back then, and we normally had a quorum. Our committees were set up and usually met before or after board meetings. Having committees meet before the board meeting was great because committees could report directly to the board after their meetings. In the beginning, committees consisted only of board members, but were expanded to include any chapter member who was interested. Committee meetings, especially the annual conference committee, normally were held in a member's office, usually in the Harrisburg area. Our tasks were to organize the chapter's annual conference and newsletter suggestions. These meetings usually included dinners of pizza and beer and a lot of fun and we really accomplished a lot in those few hours with everyone working, suggesting educational topics, finding speakers, copying, licking envelopes and stamps. We never hired an outside source to put anything together or do mailings. We really did it all. While we completed our tasks, we always talked tax law and discussed new tax laws in full details.

In the beginning we tried to scatter board meetings across the state to get other NATP members involved in the chapter. We even tried to piggyback PSEA and PA-NATP board meetings and annual conferences with the hopes of both chapters helping each other. Many of our members back then were members of both organizations. It worked initially, then just fell apart. After the board meetings, we normally all got together for dinner, drinks and possibly a movie in someone's hotel room. We really were like a family, disagreed at times as family does, then went with the best idea for the membership and still loved each other after the discussions were over.

When it was time for NATP's Annual National conference, we did our best to represent our state chapter in very silly ways. Back then, most chapters could have a room for a chapter meeting plus had a hospitality room (PA used a member's room) and invite other state members to attend along with other state chapter leaders/members. PA was known for filling their hotel bathtub with ice and putting all the fruits, cheese, and veggie platters on ice so they would not spoil during the hospitality time. The first conference in Washington, D.C. is probably the one I remember the most. I believe that is when NY and PA received their charter. One of our members had and played a Boomba, which we took on the metro. Okay, picture this - what all those DC city folk thought when they saw this one-man band along with other crazy PA residents clapping and laughing on the metro...maybe you had to be there. I still laugh about that one. PA decided to interrupt all the chapter meetings, especially NY, with our fearless Boomba leader along with the other PA members who joined in. PA always liked picking on the NY chapter back then because they were always so serious. Plus, there still was a question in my mind which state really received their charter first, PA or NY. To any NY members reading this, you know I am only kidding. Yes, we know NY was first. Mail was slow that year, so PA was a little after NY. Even though this was a national event, it was something the PA chapter leaders did together and had a lot of fun.

During tax season, I was able to work 20 hours a day with no problem. Hey! I was only 31 years old. I always knew that when I ran into a tax problem at 1:00 AM, there were at least two or three other tax professionals who were my best friends and I could count on, that I could call. I would have never known these friends if it were not for my involvement in the organization of the PA-NATP chapter. After PA-NATP's first year as a chapter, I expanded my business to include partnership, corporate, and non-profit returns, plus sat for my EA exam. I also attended NTP's 3-year program and enjoyed representation. It is amazing how networking with your fellow tax professionals is one of the best educational benefits one can receive. The growth of my business would have never happened as quickly as it did were it not for me being involved with organizing the PA chapter.

When I was president of PA-NATP, I had the best officers and board members who helped me make the state chapter better. I truly had the best volunteers and my best friends serving on the board. Do yourself and your business a favor and get involved in your chapter. It will be the best investment you ever made. I feel privilege and honored to be asked to write some thoughts about "back in the day" when PA-NATP was organized. I now want to challenge my fellow initial organizers to add their thoughts throughout the year for the Chapter Newsletter on their awesome experience or funny stories.

Thank you for reading this, and I hope all of you have a stress free and prosperous tax season. Happy Tax Filing!!

PA NATP Chapter Scholarship Fund

Submitted by Joyce Jones

The chapter is now offering several scholarships because of the generosity of several members and the hard work of the chapter through the past few years. We currently have a balance of \$5201.60 in our chapter scholarship fund.

We must keep a principal amount of \$2,000.00 in the fund, but we have about \$3,200.00 available for scholarships to our members. This year your board of directors decided to offer scholarships to our members for several items. You can apply for a scholarship for Part I, II, or III of the Enrolled Agent Exam, to attend the PA-NATP Annual Conference, or any of the educational events the chapter is planning for 2022.

Our chapter first began the scholarship program to honor a deceased member, Dave Knickerbocker. Dave was very active in the chapter. He died as a result of a fall, and his passing was a shock to the members of the chapter who had worked closely with him. Dave was a self-employed tax preparer and a substitute teacher at General McLane High School. To honor Dave's memory, the chapter worked with the Erie Community Foundation to create a scholarship for a deserving senior who attends General McLane School District and plans to attend college to major in accounting. To fund the scholarship the chapter instituted the Chinese auction held during the annual conference, accepted contributions to the scholarship box that is at every education event the chapter holds, and accepts donations from members. Having a balance in the Knickerbocker Scholarship of over \$10,000, it is fully funded and self-sustaining per the requirements of the Community Foundation. As a result of that, the board decided to continue its efforts to raise funds to create scholarships for our chapter members.

To apply for a scholarship, you must complete the 2022 Scholarship application with the required information. Once completed, you must 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, 2022. Once received, the 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.

The education committee is working on current year education events. Once approval is received from National, it will be posted on our chapter website at <http://panatptax.com/>. You can apply anytime for a scholarship to the Annual Conference or the parts for the Enrolled Agent exam. However, if you are choosing to apply for a specific chapter education event, you will need to visit the chapter website to see what will be available.

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, 2022

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

2022 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 the 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 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:

Mary Lynn Lemmon
16128 Rt 119 Hwy N
Rochester Mills, PA 15771

mll.panatp@gmail.com
724-286-9771

