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Board of Directors

Executive Committee

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724-763-3049
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President's Message

In a few short weeks, the start of another tax season begins, although it seems as though last tax season never ended. While we continue to learn about all of the new tax changes, we are also changing the way we run our offices. Portals, zoom meetings, e-signatures, masks, hand sanitizer, and lots of Lysol have become the new normal.

We were able to offer our annual meeting on November 10th via Go To Webinar. As part of the meeting, we also included local updates from Berkheimer and Keystone. This was free to all members. On November 12th, we had our state update also via Go To Webinar. Both meetings were very well attended and had great reviews overall.

On December 17th, we also had a training on the new myPath Portal with the Department of Revenue. This was a great opportunity to see demonstrations and ask questions.

Any finally, on December 22nd we had an informal zoom meeting open to members to discuss office practices and obtain ideas and suggestions for operating your office during the pandemic. A lot of good discussion came from this. A big thank you to Jason Weisz and Troy Clawson for leading the discussions.

For 2021, the Board officers are as follows: Holly Whiteside - President, Troy Clawson - Vice-President, Joyce Jones - Secretary, Susan Bure - Treasurer. The chapter would like to recognize Joyce Jones as the recipient of the 2020 Award of Excellence. Joyce works tirelessly for the Chapter as our Secretary and helps keep us all organized! We appreciate her very much! We are planning our education for 2021. Many things will depend on the status of the pandemic. Rest assured that we will do what we can to bring you updates and education either through webinars or in person. Your health and safety are our priority.

I hope that you all have a safe, healthy and 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.

2021 PA-NATP Board of Directors

<p>Holly Whiteside, EA (21)(xx) President Warfordsburg, PA 717-294-6659 mytaxbiz@live.com</p>	<p>Troy Clawson (21) Vice President Youngsville, PA 814-563-7047 taxpro@tmctax.com</p>	<p>Susan E. Bure, AFSP (23) Treasurer Manorville, PA 724-763-3049 accountingbysue@windstream.net</p>
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<p>Mary Lynn Lemmon, AFSP (21) Marchand, PA 724-286-9771 mll.panatp@gmail.com</p>	<p>Marianne Kleppner, EA (21) Finleyville, PA 724-348-8028 kleppner@comcast.net</p>	<p>Patti Blum (22) Sheffield, PA 814-968-5919 widders5@windstream.net</p>
<p>Charles C. Evans, Jr (22) Downingtown, PA 610-873-2073 evansjrc@verizon.net</p>	<p>Paul Pascuzzi, EA, MBA (22) Clarendon, PA 814-723-1088 paul@taxcuzzi.com</p>	<p>David Luczak, EA (22) Pittsburgh, PA 412-680-8572 DLuczak@Pallastax.com</p>
<p>Vicki Ziegler (22) New Castle, PA 724-657-0047 vicshaffer@gmail.com</p>		<p>Rev 12/31/20</p>

(xx) indicates year term will expire

2021 PA NATP Committee Members

AUDIT

Sue Bure
Vicki Ziegler

AWARDS

Charles Evans-Chair
Joyce Jones

BUDGET

Executive Committee

BYLAWS

Samuel Wingard - Chair
Patti Blum

EDUCATION

Patti Blum- Chair Kath Bowman
Susan Bure Holly Whiteside

MEMBERSHIP

Mary Lynn Lemmon – Chair

NEWSLETTER/COMMUNICATIONS

Mary Lynn Lemmon - Editor
Joyce Jones - Proofreader

NOMINATIONS

Paul Pascuzzi-Chair
Vicki Ziegler
David Luczak

PUBLIC RELATIONS/WEBSITE

Marianne Kleppner - Chair
Troy Clawson
Patti Blum
Holly Whiteside

NATIONAL CONFERENCE

Walter Douglass
Patti Blum

WEBINAR COMMITTEE

Marianne Kleppner-Chair
Holly Whiteside
Troy Clawson
Patti Blum

SCHOLARSHIP FUND

Joyce Jones – Chair
Susan Bure
Troy Clawson
Patti Blum

SEMINARS & EVENTS

PA/Local

Patti Blum
Kath Bowman

Working Together – East

Chuck Evans

Working Together – West

Patti Blum
David Luczak

Annual Conference

Holly Whiteside - Co-Chair
Patti Blum - Co-Chair
Chuck Evans
Marianne Kleppner
Walter Douglass
Andrea Phillips

TAX PRACTITIONER LIAISONS

IRS-Walter Douglass
PA- David Luczak
Local- Joyce Jones

CHAPTER BETTERMENT

Susan Bure

2021 Calendar of Events

PA Chapter events in bold type
National events in italics

**January 6, 8:30am-12pm
(Wednesday)**

**Board of Directors
Zoom Meeting**

**May 12, 8:30
(Wednesday)**

**Board of Directors
Zoom Meeting**

**May
(TBD)**

East Working Together

**July 7, 8:30am-12pm
(Wednesday)**

**Board of Directors
Zoom Meeting**

*July 11-15
(Monday-Thursday)*

*NATP National Conference & Expo
Baltimore, MD*

**September, 8:30am-12pm
(Wednesday)**

Board of Director Zoom Meeting

**September
(TBD)**

**West Working Together
Regional Alliance Center, Cranberry**

**November 7, 4pm-8pm
(Sunday)**

**Board of Directors Meeting
(TBD)**

**November 9-10
(Monday-Tuesday)**

**Annual State Conference & Membership Meeting
(TBD)**

Welcome New Members

The PA Chapter is honored to welcome these new members

June 2020

Mariah Hanscom	York
Anna Filippova	Philadelphia
Elizabeth Defrancisco	Delaware
Thomas J Becek	Allegheny
Brian Jerome Sweeney	Allegheny
Karen Potteiger	Perry
Stefanie A Bennett	Lycoming
Lisa Guthrie, CPA	Tioga
George Charles Pry	Clearfield
Marilou T Lambert, EA	Chester
Howard Litz	Montgomery
Kenneth Michael McDaniel, EA	Beaver
Leslie Cugini	Allegheny
Melanie Mae Sweeney	Allegheny
Tracey Michaud	Allegheny

July 2020

Amy Urbaniak	Butler
Michele McNeil	Bucks
Joanne L Ellinger	Bucks
Daniel F Becker, EA, CFP(R)	Northampton
Colin Doyley	Philadelphia
Earlene E Clark, CPA	Montgomery
Jena Lynn Vastag	Allegheny
Nicholas R Spinosa, CPA, EA	Lawrence
Amanda Snyder	York
Carl Sturges	Chester
Minal Babaria, CPA, CTC	Lehigh
Danny R Bowser	Armstrong
James Mckeon, EA	Montgomery
Aaron Frank Bonus, CB	Butler
Michael Prokell	Allegheny
Jenny Carden	Bucks
Anne Christine Cavallaro, EA	Chester

August 2020

Jeremy Stowe	Beaver
Beth Ellis	Philadelphia
Kate McKenna Reber	Schuylkill
Patrick Rogers	Philadelphia
Megan E Haselden	Allegheny
Martin G Lawler, EA	Lackawanna
Amy Elizabeth Walter	Erie
Jessica Daniels	Bucks
Marie Hebbel	Bucks
William Kohler	Bucks
Norma J Jones	Erie
Robin Norton	Franklin
James J Newhard, CPA	Chester
Karen M Mele	Erie
Deborah A Ficner, EA	Dauphin
Joanne Bryson, CPA	Montgomery

September 2020

Jeffrey S Hyle CPA, CPA	Lancaster
Laura Schramm	Allegheny
Angela Eyster Lohrey, CPA	York
Timothy Nelson	Philadelphia

October 2020

Kenneth Rapp, CFP, BFA	Cumberland
Lena Hicklin	North Hampton
Alexis K Mahoney	Lycoming
Nancy Houston	Lycoming
Laura L. Largo-Shosh	Lehigh
Susan K. Shutt, EA, CMA	Cumberland
Brian J. McGeown	Allegheny
Jeffrey Driscoll, EA	Crawford
Kate Radivojevich	Crawford
Derek Jon Latch	Allegheny
Teresa A Parris	Montgomery
Edward Shannon	Montgomery
Rita E Preston	Crawford
Jan L Spano	Washington
Joseph V Satira	Allegheny
Carol Reiner	Chester

November 2020

Kendria Donalle Angrand	Monroe
William E Tinsman, Jr AFSP	Pike
Allison Greydanus	Monroe
Jenna L. Kiess	Lycoming
Michelle A Kershaw	York
Julia Brufke Wenger, EA, CFP	Chester
Mary Louise Petrucci	Somerset
Michael Volinskie	Snyder
Annie Morales	Franklin
Suresh Patel	Bucks
Eileen V Morelock	Montgomery
Jasmine E Silver	Lycoming
Jacob Ruggles, EA, CRP	Lehigh
Carolyn West	Philadelphia
Ellen Azrael, EA	Berks
Tom Napoli, CPA	Bucks
Twanna W Johnson	Philadelphia
William Waters, CPA	Lancaster
Ave N Cinar	Monroe
Jeffrey Horrow, EA	Montgomery
Linda Jean Skunda	Allegheny
Brooks Lee Gleckner	Bradford
Nigel Jones	Pike

Welcome New Members, cont.

The PA Chapter is honored to welcome these new members

December 2020	
Roger William Knouse	Westmoreland
Jon Sattazahn, EA	Lancaster
Jami Dee Jamison	Berks
Cameron E Koch	Tioga
Joseph Davis, IV	Cambria
Sarah Susannah Barnshaw	Montgomery
Lindsay Kaufmann	Bucks
Barry Roach, Jr	Dauphin
Babette Walter	Montgomery
Caterina Dell, EA	Huntingdon
Esmeralda Gonzalez	York
John J Roberts	Bucks
Anthony DeMarinis, EA	Bucks
Camden J Hess	Lancaster
Denise Loula, AFSP	Lancaster
Chad Eric Rugh	Venango
Shirley Muhammad	Allegheny
Todd A Eckenroad	Bedford
Tsigereda Gebremariam	Crawford
Jaringo Buechel	Bucks
Sadonna Lyals, MST	Montgomery
Bernard Fagnani, CPA	Lackawanna

December 2020	
Jennifer Sidella	Schuylkill
Kylla Herbert	Philadelphia
Cheryl Glazer	Montgomery
January 2021	
LeaAnn M Coston	Crawford
Andrew Ayers	Lancaster
Patrice R Thompson, EA	York
Domonique Corey, AFSP	Montgomery
Mary Gresh	Allegheny
John H Fausnacht, Jr	Lancaster
Trudy D Duncan	Mercer
Michelle L Simco	Chester
Karen R Galitz	Berks
James Hanning	Philadelphia
Kwame Amofo Danquah	Monroe
Catherine E Bente, AFSP	Monroe

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>.

Board/Committee News



NATP PENNSYLVANIA CHAPTER
AWARD OF EXCELLENCE
PRESENTED TO JOYCE JONES, E.A.
ON NOVEMBER 10, 2020

Whereas the Pennsylvania chapter, of National Association of Tax Professionals, is a body of men and women, from across the commonwealth who work together in order to increase their knowledge of matters of tax, in order that they may serve their fellow citizens. At one time or another, in order to serve, we study new legal requirements and present programs of education to assist fellow preparers.

To do so, there is a body of fellow members, our board of directors, who work long and hard, to bring us together, so that we may learn, serve and assist other preparers in Pennsylvania.

In order for our association to be visible and vital, there must be someone out front, leading and directing, with others supporting, in the background. Those in the background are equally necessary for the maintenance and organization of the Chapter. This is necessary, so that programs such as today, can be produced.

Today, we are taking the time to recognize one lady who has quietly and faithfully served our chapter. She has done this while maintaining her tax business, running a farm and raising a family. Thus, in experience, she is well qualified to file and teach, the IRS, Form 'F' in realm of farming, she has been raising white Galloway cattle, for 21 years. This lady certainly knows something about farming, from the ground up.

A little farm humor from Charles C Evans: A visitor to the farm heard two "girls" talking: the first cow said, "I was artificially inseminated today." The second cow said, "Were you really?" "YES" the first replied, "That's no bull"

Our lady also has more farm experience, as she serves as secretary/treasurer, for the American Galloway Cattlemens Association. This service, being for the past 20 years. In another avenue of farm service, she has been an advisor to 4H youth, for the commonwealth of Pennsylvania.

Back to the PA-NATP, she will drive from New Castle, to wherever our Chapter is meeting. Today, you will find her on the side of the room towards the front, making her notes in order to report the minutes at our next meeting. Therefore, it is with honor, that we, the Pennsylvania Chapter of the National Association of Tax Professionals, recognize Joyce Jones with the 2020 Award of Excellence on this 10th day of November, 2020.

We really Thank You, Joyce, for all that you have done, and do, for our Chapter. Therefore, we are proud to recognize you today, with this Award of Excellence. You have the appreciation of all the members of the Chapter.

Charles C. Evans, Jr
Chapter Awards Chairman

Holly Whiteside
Chapter President

PA NATP Chapter Scholarship Fund

Submitted by Joyce Jones

The chapter is now offering several scholarships through of the generosity of several members and the hard work of the chapter through the past few years. We currently have a balance of \$5,386.40 in our chapter scholarship fund.

We must keep a principal amount of \$2,000.00 in the fund, but we have about \$3,386.40 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 2021.

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 2021 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, 2021. 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, 2021.

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

2021 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

