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Board of Directors

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Contents

President's Message
Mission Statement
Board of Directors
Committee Members
Calendar of Events
New Members
Get Involved & Awards
Scholarship Fund
PA DOR News
Advertising
Annual Conference/Pictures
Office Management
Adv. Rates

President's Message

Tax Season 2024 is rapidly approaching, and tax pros are busy finishing up their tax update classes and readying their offices to tackle a new season.

Our 36th Annual Conference was a great success with speakers from the Federal, State and Local Government. We also had members Helen O'Planick and Brad Messner instructing, and both did a great job! The education was top notch and included lots of materials for folks to review later.

We said many thanks to board members Andrea Phillips and Walter Douglass for their service on the board. We welcomed newly elected Directors Brad Messner and Shawn Bernheisel. The Officers installed for 2024 are Holly Whiteside – President; Troy Clawson – Vice-President; Joyce Jones – Secretary; and Susan Bure – Treasurer.

The Board is already working on planning the 37th Annual Conference for 2024. We welcome your suggestions and feedback for educational topics you think would be beneficial.

Wishing you all a very prosperous tax season!

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.

2024 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 | Susan E. Bure, AFSP (26) Treasurer Manorville, PA 724-763-3049 accountingbysue@windstream.net |
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| Helen O’Planick (24) Manchester, PA 717-266-5828 heljangan@aol.com | | |

Rev 11/29/2023

(xx) indicates year term will expire

2023 PA NATP Committee Members

2024 Committee members will be determined at the next board meeting

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

2024 Calendar of Events

PA Chapter events in bold type

National events in italics

| | |
|--|---|
| January 9, 8:30am (Tuesday) | Board of Directors Zoom Meeting |
| May TBA | Board of Director Zoom Meeting |
| May TBA | East Working Together |
| July TBA | Board of Director Zoom Meeting |
| September TBA | Board of Director Zoom Meeting |
| September TBA | West Working Together |
| TBA (Sunday) | Board of Directors Meeting |
| TBA (Monday & Tuesday) | Annual State Conference & Membership Meeting |

Please keep an eye on our Website & Facebook page with updates to events as dates are Announced

Some Save the Dates!

- *July 22-24 in Orlando – Taxposium*
- *Sept. 18-19 – NATP Las Vegas Tax Forum*
- *Sept. 30-Oct. 1 – NATP Louisville Tax Forum*
- *Third NATP Tax Forum location on the East Coast TBD in September or October*

Welcome 2023 New Members

| | | | |
|-------------------------|--------------------|------------------------|-------------------------|
| Mena Ghatas | Norristown | Patricia Forsythe | Fairfield |
| Naomi Smith | Three Springs | Christian Stoecklein | Bridgeville |
| JoAnn Wallace | Irwin | Robert Williams | Thorndale |
| Earlene E Clark | North Wales | Jay Chen | Wayne |
| Kelsey Varron | Carlisle | Joseph D Bennet | Kirkwood |
| Donna Bankes | Bloomsburg | Sheryl Nulph | Natrona Heights |
| Alberto Dioses | Doylestown | Carole Ann Teska-Smith | Wayne |
| Louann Hoffman | Cresson | Victoria Cheatom | Philadelphia |
| Donna Ott Gillenwater | Phoenixville | Wanda E Mendoza | Philadelphia |
| Timothy J Bass | Grove City | Breean Bovay | Pittsburgh |
| Matt Warner | Bethlehem | Stephen Dorsdick | Danville |
| Kelly A Bender | Warrendale | Dante W Frescura | Slippery Rock |
| Todd A Stepke | Wexford | Ewa Krzeminski | Lancaster |
| Thomas Allen | Chadds Ford | Benjamin William Meck | Pottstown |
| Dannielle F Palmer | Swarthmore | Gregg Britten | Philipsburg |
| Mary B England | Oxford | Michele Kohler | Bensalem |
| Mary Ann S Catanzaro | Abington | Dorothy Ann Brower | Royersford |
| Molly M Haney | Brookville | Gina DeFlavia | Berwyn |
| Michael Clement | Pipersville | Linda L Thoma | Butler |
| Tina Chillcott | Brookville | Manish Patel | Warminster |
| Alan Szyal | Feasterville- Trev | Craig Loeffler | Lancaster |
| William T Smith | Lansdowne | Victoria Jaye Tyler | South Abington Township |
| Regina Lynn Anderson | Airville | Akshay Thakar | Lansdale |
| Jennifer Y Kelecseny | Philadelphia | Debra Robinson | Murrysville |
| Timothy Nelson | Natrona Heights | Rachael Graf | Pittsburgh |
| Kay Corbin | New Cumberland | Tyler Hackenberg | Willow Grove |
| Frank H Kelly | Duncannon | Barbara Davis | Souderton |
| Phyllis Krieger | Canonsburg | Irina Matusoc | Richboro |
| Jeffrey William Cabbage | Barnesville | Jovita Rapley | Upper Darby |
| Robert Brian Peiffer | Harleysville | Matt Civitello | Lansdale |
| Sandra Szumiloski | Royersford | Jeremy William Smith | Pittsburgh |
| April Heiser-Liedike | Philadelphia | Mary R Stutzman | Newport |
| Zachary Cooper | Fairfield | James J Wilson | Wellsboro |
| Carol Cowdrick | Olyphant | Jessica R Lanier | Norristown |
| Deborah Essig | Shohola | Julie Perez | Philadelphia |
| Terry T Maloney | McKees Rocks | Nicholas J Rohr | Pittsburgh |
| Nathaniel D Jackson | Gouldsboro | Katelyn Marie Ward | Bensalem |
| Sheila Regina Marshall | Carlisle | Richard L Aultman | Carmichaels |
| Kim Reese | Pittsburgh | Lisa McAllister | King of Prussia |
| Deborah Jean Scotto | Pittsburgh | Terence Rice, III | New Castle |
| Jeanne Cherry | Huntingdon Val | Dennis G Snyder | Westfield |
| Zalig H Stein, | Oley | George McReynolds | Lansdale |
| Amanda Schicking-Clouse | Norristown | Jackeline Candelario | Lebanon |
| Marianne Borneman | West Springfield | Derek Mathew Pixley | Blakeslee |
| Amy Elizabeth Walter | Finleyville | Ellen Kotermanski | Glenshaw |
| Connie G Custer | Milton | Kelly Renee McGuire | Bensalem |
| Timothy Owen Wirt | Ottsville | Brent Bocian | Mars |
| Crystal A Koretzky | Pipersville | Julia Brufke Wenger | Phoenixville |
| David Edmund Yearing | Bethlehem | Natalia Svedova | Huntingdon Valley |
| Thalita Olivera | York | Anthony Davis | Elkins Park |
| Christina E Smith | Duncannon | Mary Dylewski | Erie |
| Michael Volinskie | Williamsport | Norma Jones | Erie |
| Paige J Martineau | South Park | Jessica Salazar | Erie |
| Tracey Joyce | Carnegie | Patricia Heiss | Pittsburgh |
| Jerald C Lear, Jr | New Brighton | Terri Johnson | Hollidaysburg |
| Tracy Stowe | East Stroudsburg | Francis McConnell | Philadelphia |
| Janis Marie Menist | Towanda | Tyler Goralski | Hanover |
| Kaylee Morse | Philadelphia | Amber Spells | Pittsburgh |
| Twanna W Johnson | New Cumberland | Derek Shanaman | Lebanon |
| Partick Jeffries | Schwenksville | Michael Zinczenko | Lansdale |
| Linda Peterson | Lititz | Gavin Bender | Bethel |
| Catherine T Duke | | Jamilia Djumadullaeva | Pittsburgh |
| | | Morgan Miller | Bethel |
| | | Diana Voss | Danville |
| | | Desiree Delessio | Middletown |
| | | Eugene Brown, Jr | Darby |
| | | Donald Bender | Warrendale |
| | | Constance Lyon | Emporium |
| | | Steve Templeton | Coraopolis |

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

The awards committee is looking for someone who exhibits the characteristics for the PA-NATP chapter Award of Excellence. Each year this award is given to a person who has gone above and beyond the call of a good chapter member. Do you know someone who stands out in the tax profession as an educator, writer, speaker, or tax preparer, someone who encourages folks to join the chapter? Is there someone you know who is a community volunteer who goes out of his/her way to help folks with their tax situations? Maybe they do segments on a radio talk show, speak locally about tax issues, handle a website of their own, do a blog talking about taxes, or are active in Face Book.

Our chapter has over 1000 members who are all busy with their lives and families, but some of them go above and beyond. We want them to be recognized for their efforts and abilities. The committees for the chapter are organized in January, so as of this current date we do not know who will work on the awards committee. But it surely would be great if you chose to recognize a colleague of yours whose persona fits the qualifications for the chapter Award of Excellence. Below is the list of folks who have been honored since the award was created. Please consider the past chapter Award of Excellence winners and nominate someone you know who also exhibits these characteristics. There are several people who work on the awards committee, and the lament is that with over 1000-chapter members, we do not know very many of them as they are scattered all over the state. But we do know they are out there doing great things. Please nominate someone you believe to be a winner so we can honor them at our annual conference in 2024. Submit their name, address, phone number along with a short paragraph about why you think they should be selected. Include your information in case we need to contact you to clarify details. We need this information by early July so the committee can select a winner and prepare the award. Please forward the info to our Awards Committee chairperson, Charles Evans, Jr. @ evansjrc@verizon.net

Past Award of Excellence Recipients

| | |
|-----------------------|-------------------------------|
| 2002 – Linda Bleil | 2014 – Denise Brandt |
| 2003 – John Killian | 2015 – Erica Knight |
| 2004 – Kathy Bowman | 2016 – Drew & Mary Jane Stump |
| 2005 – Denise Madeira | 2017 – Dave Fleming |
| 2006 – Angel Leasure | 2018 – Holly Whiteside |
| 2007 – Sam Wingard | 2019 – Patti Blum |
| 2008 – Rich Miller | 2020 – Joyce Jones |
| 2009 – Sean Brennan | 2021 – Susan Bure |
| 2010 – Patti Blum | 2022 – Charles Evans, Jr. |
| 2011 – Justina Tushak | 2023 – Jeff Cohick |
| 2012 – Patty Turner | |
| 2013 – None | |

PA NATP Chapter Scholarship Fund

Submitted by Joyce Jones

Hello to all PA-NATP members:

Now that tax season is "officially" over, I am sure you are also thinking about the upcoming tax season and trying to get all other returns and problems resolved. You have most likely finished much of your 2024 tax season education and thought about how expensive it has become. Please take note of our PA-NATP chapter scholarship. Applying for a chapter scholarship could help to defray some of that expense in 2024. We currently have about \$3800 available in our chapter scholarship fund for members who apply for scholarships. This money is available to applicants who want to attend a chapter education event or who want to become an enrolled agent.

To apply for a scholarship, you must complete the 2024 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, 2024. Once received, applications will be reviewed by the scholarship 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. Good luck to all applicants!

PA-NATP Scholarship Application Directions

DEFINITION: A scholarship will be given to any active member of the PA Chapter of National Association of Tax Professionals 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, 2024

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.
3. 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 2024 SCHOLARSHIP APPLICATION

NAME: _____

ADDRESS: _____

CITY: _____ STATE: _____ ZIP CODE _____

TELEPHONE #: _____ EMAIL ADDRESS: _____

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 the completed application to

**Joyce Jones,
Scholarship Committee Chairperson
395 Double J Lane
New Castle, PA 16101.**

IRS-PA DOR-Local NEWS

The Child and Dependent Care Enhancement Tax Credit

Harrisburg, PA — **Secretary of Revenue Pat Browne** today applauded legislation signed earlier this week by Governor Josh Shapiro that expands Pennsylvania's Child and Dependent Care Enhancement Tax Credit. The expansion of this credit will be a major help to working families with children in daycare and other people in the Commonwealth who are caring for a family member.

"We know from the tax returns that we have received this year that the Child and Dependent Care Enhancement Tax Credit delivered critical relief to roughly 210,000 families in Pennsylvania. Governor Shapiro recognized this was a difference maker and rightfully supported the expansion of this credit so that it will be even more impactful when the next tax season opens next year," Secretary Browne said. "Research has shown that a similar tax credit on the federal level significantly reduced childhood poverty, addressed food insecurity, and helped many families secure their finances. It was the right decision to expand our Pennsylvania credit to take another step toward making our Commonwealth a better place to live and raise a family."

For more information on the Child and Dependent Care Enhancement Tax Credit, Pennsylvanians can go to <http://www.pa.gov/childcaretaxcredit>.

Who Qualifies & How Much is Available?

The Child and Dependent Care Enhancement Tax Credit that is available to Pennsylvanians is based on the federal Child and Dependent Care Tax Credit. That means that taxpayers must receive the federal credit to also be eligible for the state credit in Pennsylvania. Under the legislation signed this week by **Governor Shapiro**, the state credit is now equal to 100 percent of the federal credit, meaning:

- The maximum credit will be \$1,050 (one child) or \$2,100 (two or more children).
- The credit cap phases down as income levels increase.
- The minimum credit will be \$600 (one child) or \$1,200 (two or more children).

In order to claim the credit on your PA Personal Income Tax Return (PA-40), you must have incurred care expenses for:

- A dependent child under age 13.
- A spouse who was physically or mentally incapable of self-care and lived with you for more than half the year.
- An individual who was physically or mentally incapable of self-care, lived with you for more than half the year, and either:
 - Was your dependent; or
 - Could have been your dependent, except that he or she received gross income of \$4,400 or more, filed a joint return, or could have been claimed as a dependent on another taxpayer's return.

The credit is refundable, meaning qualified taxpayers will earn the full amount of the credit in a refund, after accounting for any tax obligation due.

Expansion to Property Tax/Rent Rebate Program-Changes Coming in 2024

Governor Josh Shapiro delivered on a promise he made to older Pennsylvanians when he signed a new law, Act 7 of 2023, that significantly expands the Property Tax/Rent Rebate (PTRR) program. This historic legislation delivers the largest targeted tax cut for Pennsylvania seniors in nearly two decades.

Under the expansion first proposed by the Governor, nearly 175,000 more Pennsylvanians will qualify for a property tax or rent rebate. At the same time, many of the 430,000 claimants who previously qualified under the program's prior guidelines will see their rebates increase.

What's New?

Starting in mid-January 2024, the Department of Revenue will open the filing period for eligible applicants to submit applications for rebates on property taxes and rent paid in 2023.

Here are the changes that will take effect at that time:

First, the maximum standard rebate is increasing from \$650 to \$1,000.

Second, the income cap for both renters and homeowners will be made equal and increase to \$45,000 a year:

- The income cap for homeowners will increase from \$35,000 to \$45,000.
- The income cap for renters will increase from \$15,000 to \$45,000.

Third, the income caps will be tied to the cost-of-living moving forward, meaning those who receive a rebate won't lose their eligibility in the future due to no fault of their own.

ELIGIBILITY TABLE FOR HOMEOWNERS AND RENTERS

| INCOME | MAX REBATE |
|---------------------|-------------------|
| \$0 - \$8000 | \$1,000 |
| \$8,001 - \$15,000 | \$770 |
| \$15,001 - \$18,000 | \$460 |
| \$18,001 - \$45,000 | \$380 |

Supplemental Rebates

The income eligibility did not change for supplemental rebates under the new law. However, the amounts were increased based on the new standard rebate levels. Supplemental rebates are still automatically calculated for property owners with \$30,000 or less in income who live in:

- Philadelphia, Scranton, or Pittsburgh.
- Property taxes are 15% or more of total income.

| Income | Standard Rebate | Supplement (Kicker) | Total Max Rebate |
|-------------------|-----------------|---------------------|------------------|
| \$0-\$8,000 | \$1,000 | \$500 | \$1,500 |
| \$8,001-\$15,000 | \$770 | \$385 | \$1,155 |
| \$15,001-\$18,000 | \$460 | \$230 | \$690 |
| \$18,001-\$30,000 | \$380 | \$190 | \$570 |

What Has Stayed the Same?

- **Forms and Schedules:** There are no changes to the forms or schedules used for filing a rebate application, meaning prior applicants will use the same process to file their applications that they are accustomed to.
- **Eligibility Criteria:** Applicants of the Property Tax/Rent Rebate program must still fall under one of the previous four categories to qualify. That means the program will continue to benefit eligible Pennsylvanians age 65 and older; widows and widowers age 50 and older; and people with disabilities age 18 and older.

Important Dates in 2024

Although the income caps and the maximum standard rebate have increased, the key dates that applicants should be aware of have stayed the same under the new law.

January:

- The Department of Revenue opens the online application on [myPATH \(mypath.pa.gov\)](https://myPATH.pa.gov) to allow eligible applicants to file their rebate applications on property taxes or rent paid in 2023.
- Property Tax/Rent Rebate program booklets will be mailed to applicants who filed a paper rebate application for the prior application year.
- Forms and instructions for the 2023 application year are uploaded to the Department of Revenue website.

April:

- Posting/processing begins.
- Automated calls begin to notify applicants that their applications were received.

June:

- Automated calls begin to notify applicants that their applications were approved.
- The Department of Revenue evaluates the program prior to the statutory June 30th filing deadline to determine if funds are available to extend the deadline.

July:

- **July 1:** This is the first day that rebates will be paid via direct deposit and checks will be mailed to applicants.

December:

- **December 31:** It is expected this will be the final filing deadline for rebate applications on property taxes or rent paid in 2023.

How to File

All eligible Pennsylvanians are encouraged to file their rebate applications online using [myPATH](https://mypath.pa.gov) (mypath.pa.gov). Click on the "Apply for a Property Tax/Rent Rebate" hyperlink from the "Rebates" panel on the homepage. [myPATH](https://mypath.pa.gov) is the fastest, easiest, and most secure way for eligible applicants to submit their applications.

Prior applicants:

- Any person who filed a Property Tax/Rent Rebate application **by paper** will automatically receive a PTRR Booklet in the mail from the Department of Revenue.
- Any person who filed **via [myPATH](https://mypath.pa.gov) or went to a tax preparer** will automatically receive a reminder letter and rent certificate in the mail from Department of Revenue.

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

**** Your ad on this page can reach over 1200 PA tax professionals.
See page 17 for more information!**

Annual Conference

Submitted by Joyce Jones

The Scholarship Committee of the PA-NATP Chapter salutes all the members who supported the Silent Auction at the chapter's annual conference and/or bought tickets for the 50/50 raffle each day!

Thanks to all of you who either donated items for the auction and/or bid on those items. Many thanks also to those who participated in the 50/50 raffle each day.

Due to your generosity, our chapter scholarship fund now has over \$3800 available for any member who wants to apply for the scholarship to attend a chapter educational event, the chapter annual conference, or apply to take the enrolled agent exam.

The winner of the first conference day raffle was Kathy Gerlach. The second day's winner was Cindy Yerges. Both ladies donated a portion of their winnings back to the scholarship fund. Congratulations and thank you to both ladies.

Our scholarship winners for 2023 were Deborah Giles from Philadelphia and Marcia Prince from Shinglehouse. Congratulations, ladies, on well written applications.

A NOTE FROM ONE of OUR MEMBERS

For those who missed PA-NATP's annual conference in Harrisburg on November 13th and 14th 2023. First let me confess I have missed this awesome conference for quite a few years. Between Covid and some personal issues I was not able to attend the Chapter Conference for quite a few years.

Monday morning walking in the room and seeing members I have not seen for many years was, personally, the best. Networking with all these awesome professionals for the past few years has been the best and deeply missed. Seeing them again live in person was the greatest.

PA Department of the Revenue representatives did an awesome job. Alicia Gonse, Donald Bianchi, and Jane McCurdy were so informative, thank you. Their update on PA Personal Income Tax, NRK-1 and RK-1 issues, myPATH and personal property tax changes along with other miscellaneous tax law updates/changes was fantastic. We as an organization in this great state need to realize how important it is to have a working relationship with our government officials. These three really care and want to enhance the working relationship with the tax professional community. Thank you to our Chapter Board for preserving this great relationship.

Mr. James Hunt then had an opportunity to update us on local tax issues. Local tax issues definitely are not one of my favorites. Mr. Hunt provided us with updates on the local side of our tax laws, and included the importance of those PSD codes. Again, thank you Chapter Board members for keeping that door open with our local tax agencies and Mr. Hunt for a very informative session.

Helen O'Planick, one of our awesome Chapter Board members, did an awesome session on Savings Bonds. I was amazed at what I learned from the session and how I can help some of my elder clients who have all those savings bonds. Helen gave us some great tax saving tips. Great session Helen, thank you.

Our annual meeting was held Monday evening. What a great time to network with my fellow peers. The food was fantastic. On a side note, the hotel was great for me, the accommodations fantastic and location perfect. Holly Whiteside took charge of the annual meeting and did a great job, what a wonderful leader. Amanda, NATP representative, updated us on national and expressed how much she enjoyed attending the conference.

Jeff Cohick, one of the original founders of this great chapter, received the Award of Excellence for all the work he has done for the chapter and his community. Jeff reminded us that if it would not been for Frank Kelly, the person responsible for starting the chapter, this chapter would most likely not be here today. Thank you, Frank!!!!

Tuesday morning started out with a bang. Before Mr. Furlong started Helen O'Planick took a few minutes to update us on the new upcoming Corporate Transparency BOI regulations. Helen was only given a few minutes to update us on this new change and upcoming filing requirements, thank you!

Richard Furlong from the IRS took over for the bulk of Tuesday morning updating us on the updates with IRS. The attendees had a very interactive conversation with Rich on ERC credits, 2023 tax law changes, 1099-K reporting, and Clean Energy Credits. Throughout Rich Furlong's discussion he asked attendees for their comments. The attendees participated in a very active and informational conversation on different issues, comments, and questions on the issues.

Brad Messner stepped in right before lunch and continued until mid-afternoon about Cyber Security. Brad gave us the best, sometimes scary, information, suggestions, and guidance on implementing security policies and how to safeguard our client's data. Talk about a security geek. We all need a Brad Messner in our office to review our WISP and help us keep our client's data secure. Excellent information and examples given. What an eye opener for me. Brad's session was excellent, thank you very much!

Two US Marines stopped in to pick up the Toys for Tots we collected and includes an update on their progress in this program. Thank you, gentlemen, for your service and dedication to our country. The silent auction is always a fun event for me. I always enjoy raising money for the PA-NATP Scholarship Fund.

I want to thank the Board of Directors for a fantastic conference. Thank you so much to each of you for all your time and dedication you give to our members and our profession. Great job, you all should receive the award of excellence. I hope in the future each and every member of PA-NATP will have the opportunity to meet the PA Chapter Board Members. They do an awesome job taking care of our chapter. All of them are volunteers and care about our profession. Thank you so much!

Best wishes in the upcoming year!!

Sincerely,
Denise E Brandt, EA

Pictures

Some Pictures from our 2023 Annual Conference



Thank you for being such wonderful hosts at the NATP Pennsylvania Chapter Annual Conference. It was great to get to know so many Pennsylvania members and learn more about your businesses. It gave me a greater understanding of how valuable chapter leaders are and the impact of a successful chapter.

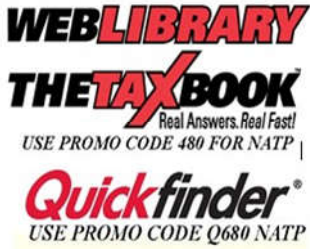
All the best in the new year!

Amanda Schumacher - Program Manager, Chapters & Engagement-National Association of Tax Professionals



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