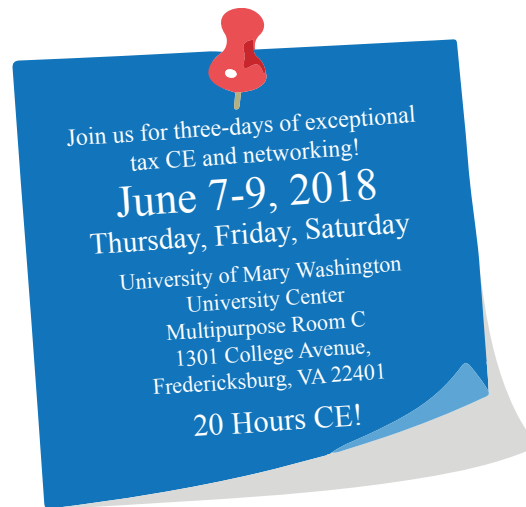


VASEEA

VIRGINIA SOCIETY OF ENROLLED AGENTS

P.O. Box 2873
Mechanicsville, Virginia 23116



20 Hours of Circular IRS 230 CE! Save \$25 by Registering Before May 18, 2018

Seminar Location

University of Mary Washington ~ University Center
Multipurpose Room C

1301 College Avenue, Fredericksburg, Virginia 22401

Directions: From I-95, take Exit 130-A. Follow Route 3 East business to the traffic light for William Street. Make a left at the light. Follow William Street to the next traffic light and make a left onto College Avenue

Sleeping Rooms

Please note there are no sleeping rooms at the meeting location. However, there are several hotels within a short driving distance. We have reserved a block of rooms at the following hotel: Hyatt Place Fredericksburg at Mary Washington, 1241 Jefferson Davis Highway, Fredericksburg, Virginia 22401. The group rate is \$109 per night plus tax for reservations made by May 16, 2018. Reservations made after May 16th are subject to availability and higher rates. The Hyatt Place is 0.9 miles from the meeting location and features an on-site restaurant and bar and a complimentary hot breakfast buffet each morning. Call (540) 654-3333 for reservations and reference "G-VAA1", or reserve online at http://fredericksburg.place.hyatt.com/en/hotel/home.html?corp_id=G-VAA1.



NAEA | POWERING AMERICA'S TAX EXPERTS®
NATIONAL ASSOCIATION OF ENROLLED AGENTS

Member Discounts

Member pricing applies to members of NAEA and VASEA, associates of VASEA, their spouses, and staff.

Early Bird Discount

Save \$25 on full registrations postmarked on or before Friday, May 18, 2018.

Company Discounts

Companies registering more than two of their employees receive an additional discount. Companies may subtract 5% for 3-5 registrations, 10% for 6-10, and 15% for 11 or more attendees. Payment must be made by company check or credit card.

Registration Includes

Continental breakfasts, lunches, morning and afternoon coffee and refreshment breaks, and downloadable handout materials for each session registered. A full registration includes 20 hours of IRS CE.

Refund Policy

Refunds will be honored if written notification is received at the Administrative Office by Friday, May 25, 2018. A processing fee of \$25 will be deducted from the refund. Cancellations after May 25th will not be accepted. "No Shows" will forfeit their fees. Substitutions are allowed.

Questions

Contact Heather Greenwell, CAE, VASEA Administrator, at (804) 723-5888.

VASEEA

VIRGINIA SOCIETY
OF ENROLLED AGENTS

POWERING VIRGINIA'S TAX EXPERTS®

30th Annual Spring Seminar

Presented by: **VASEEA**
VIRGINIA SOCIETY OF ENROLLED AGENTS

Join us for three-days of exceptional tax CE and networking!

Thursday, Friday, Saturday ~ June 7-9, 2018

University of Mary Washington ~ University Center Multipurpose Room C

1301 College Avenue, Fredericksburg, VA 22401

Featured Speakers

Judy Gilmer, EA, USTCP is a self-employed practitioner in the Hampton Roads area of VA, specializing in Individual Tax Returns, Small Businesses, and Representation, with a niche for issues related to Military and Other State Returns. She has a Bachelor's degree in Chemical Engineering with a minor in Vocal Performance. She was a military spouse for over 23 years. She won several awards while managing Military VITA sites for 12 years in South Korea, New Mexico, and Los Angeles. She has taught the Military VITA classes for 9 years in NM, CA, and here in VA. Judy has been an Enrolled Agent since 2002, graduated as a Fellow from National Tax Practitioner Institute in 2010, and was admitted in 2013 as a non-attorney to practice in the US Tax Court.

D. Barry Iacono, EA, CFP has been an Enrolled Agent since 1990 and a Fellow of the National Tax Practice Institute since 1993. He is the principal in his firm, D. Barry Iacono and Associates, in Virginia Beach, VA. Barry's areas of specialization include tax preparation, representation, and education; investments; retirement, estate, and business consulting and planning. Barry has been speaking and teaching for more than 24 years. His background includes speaking on a variety of tax topics to numerous organizations in many venues including NSTP, VASEA and Chapters, and MD Society of Accountants. In 1987 Barry became a Certified Financial Planner. He holds FINRA licenses 7, 63, & 24. He is a graduate of The George Washington University with Master's and Bachelor's degrees in business.

Jenn Michelle Pedini is Co-Founder & Managing Partner of Virginia Cannabis Group. Jenn Michelle has spent years as a lobbying for cannabis law reform, both working for the National Organization for Reform of Marijuana Law (NORML) and leading state and local chapters of cannabis-related reform groups. Additionally, she has many years of experience in media and advertising. A cancer survivor herself, she dedicated herself to understanding Virginia's law and regulations, and had significant influence in the creation of the Commonwealth's medical cannabis system. She currently serves as Executive Director of Virginia NORML and Cannabis Commonwealth.

Daniel Rouleau, J.D. is a Co-Founder & Managing Partner of Virginia Cannabis Group. A graduate of Regent University's School of Law, Daniel has focused his research on issues related to cannabis policy, business and tax law, and advocacy. He has spent time lobbying for criminal justice reform both in Washington and Richmond. He plans on practicing law in Virginia, and hopes to serve the legal needs of the cannabis community in Virginia. He currently serves as Deputy Director for the Virginia chapter of NORML.

Kevin C. Huston, EA, USTCP, MBA, ChFC, CLU is the president of Blue Ridge Tax Advisors, Inc., a tax, representation, and wealth-management firm in Asheville, NC. Kevin received his BS degree in Business Management from Oakland University in Rochester Michigan, and his MBA in International Business from Georgia State University in Atlanta. In addition, Kevin holds the Chartered Financial Consultant (ChFC), and the Chartered Life Underwriter (CLU) designations from The American College in Bryn Mawr, Pennsylvania. Kevin is an enrolled agent with 30 years' experience preparing tax returns, a Fellow of the National Tax Practice Institute (NTPI) and was admitted to practice before the United States Tax Court in 2013. A nationally known tax instructor over the past 25 years, he has instructed at NATP and NAEA's National Conferences, NTPI, Drake Software tax update schools, California Society of Enrolled Agents Super Seminars, and numerous other state tax associations. He has authored several tax and financial articles for professional journals. In 2017, Kevin was awarded the NAEA Excellence in Education Award.

Kathryn M. Keane, EA, NTPI Fellow is the principal tax professional at Macanta Corporation, a small family owned tax and related services practice located in Brooklyn, NY. Kathryn speaks for many tax associations. Kathryn is the first ever three (3) time winner of NATP's Chapter Person of the Year for 2014, 2008 and for 2002 recognizing her volunteer service to the community at large as well as to NATP.

Vaughan M. Long, EA is the Founder of Tax Solutions Alliance, a firm that specializes in IRS Tax Resolution. Vaughan is a member of the Richmond, VA and National Societies of Enrolled Agents as well as the American Society of Tax Problem Solvers. He has extensive tax and negotiation experience including 7 years with the Circuit City Stores Corporate Tax and Merchandising and Buying Departments before starting his own practice. In addition to teaching for the Virginia Society of Enrolled Agents (VASEA) since 2013, Vaughan has also taught for the National Association of Tax Professionals (NATP) since 2016, and the VA Tech tax Conference since 2015. Vaughan is a graduate from North Carolina State University and holds a B.S. in Civil Engineering.



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Schedule of Events

Thursday, June 7, 2018

7:30 a.m.	Registration and Continental Breakfast
8:10 a.m.	Announcements
8:20 a.m.	K-1s and PTPs (4 Hours Tax CE) Kevin Huston, EA, USTCP This course examines the information presented on K-1 forms from estates, trusts, S Corporations, partnerships, and publicly traded partnerships (PTPs). Emphasis is placed on what the 1040 preparer needs to know about the K-1, where to put the information presented, and special considerations for basis, distribution and disposition rules.
10:00 a.m.	Refreshment Break
10:20 a.m.	K1s and PTPs continued
12:00 p.m.	Lunch
1:00 p.m.	Announcements
1:10 p.m.	Estates & Trusts 1041s (2Hours Tax CE) Kevin Huston, EA, USTCP This course examines the 1041 form including differences between an estate and a trust. A discussion of Income in Respect of a Decedent (IRD), trust accounting, and Distributable Net Income (DNI).
2:50 p.m.	20-minute Refreshment Break
3:10 p.m.	Taxing the Toke: Considerations for Cannabusiness (2 Hours Tax CE) Jenn Michelle Pedini & Daniel Rouleau, J.D. This presentation will cover federal tax treatment of state-regulated marijuana businesses and how to use corporate structure to maximize deductions.
4:50 p.m.	Thursday seminar concludes

Friday, June 8, 2018

7:30 a.m.	Registration and Continental Breakfast
8:10 a.m.	Announcements
8:20 a.m.	Terminating & Liquidating a Business (4 Hours Tax CE) Kathryn M. Keane, EA, NTPI Fellow As many clients start businesses, just as many close them. This module looks at the concepts and follows a typical small business through hands on examples. After this session, attendees will be able to: <ul style="list-style-type: none"> • Recognize and advise clients on the tax impacts of selling or liquidating their business, • Accurately calculate the gain or loss on the sale of a business and/or its components • Properly report the sale of a business and/or its components
10:00 a.m.	Refreshment Break

Friday, June 8, 2018 (Continued)

10:20 a.m.	Terminating & Liquidating a Business continued
12:00 p.m.	Lunch
1:00 p.m.	Announcements
1:10 p.m.	Serving Those Who Serve – Preparing Tax Returns for Military Taxpayers (2 Hours Tax CE) Judy Gilmer, EA, USTCP This session will guide the tax preparer through the 1040 form, from Filing Status to Signature, explaining how portions of the Tax Code, Tax Laws, Revenue Rulings, and Rev Procs, have made provisions for the military taxpayer, highlighting how the military life affects the tax return, explaining deductions and protections that the military member may (or may NOT) be entitled to, and helping the practitioner prepare a more accurate tax return for their military client.
2:50 p.m.	20-minute break
3:10 p.m.	Ethics (2 Hours Tax CE) Vaughan M. Long, EA This session will fulfill the IRS 2-hour Ethics requirement for Enrolled Agents. Mr. Long will explore relevant ethical dilemmas in the world of taxation. Attendees will be encouraged to weigh in on some interesting scenarios and conundrums.
4:50 p.m.	Friday Seminar concludes

Saturday, June 9, 2018

7:30 p.m.	Registration & Coffee
8:10 a.m.	Announcements
8:20 a.m.	Cyber Security /W-4 (2 Hours Tax CE) Vaughan M. Long, EA Tax preparers and their clients are prime targets for identity thieves and hackers. This presentation will discuss how to protect yourself and your clients. The last thirty minutes of this session will be a discussion on the new IRS W4 form that was issued this past tax season. Significant changes have been made since personal exemptions are no longer used.
10:00 a.m.	20-Minute Refreshment Break
10:20 a.m.	Roth & IRA Tax Issues (2 Hours Tax CE) D. Barry Iacono, M.S.A., CFP, EA, NTPI Fellow This session will cover basis, reporting, conversions, recharacterization, and distribution.
12:00 p.m.	Seminar Concludes

Registration Form

Complete and mail or fax to:

VASEA, P.O. Box 2873, Mechanicsville, VA 23116

Fax (804) 452-7510

Please print or type. Use separate form for each registrant.

Name _____ Badge Name / Nickname _____

Professional Designations (EA, CPA, etc.) _____ PTIN (Required for IRS CE Credit) _____

Address: _____ City _____ State _____ Zip _____

Work Phone _____ Email _____

VASEA Member/Associate [] yes [] no

Special Dietary Needs _____

Please check all that apply:

BEST VALUE!!!

- Three Day Seminar (20 Hours IRS CE)**
Members - \$405 / Nonmembers - \$435
- Thursday, June 7, 2018 (8 Hours IRS CE)
Members - \$185 / Nonmembers - \$195
- Thursday Half Day (4 Hours IRS CE)
Members - \$150 / Nonmembers - \$160
Circle one: AM or PM
- Friday, June 8, 2018 (8 Hours IRS CE)
Members - \$185 / Nonmembers - \$195
- Friday Half Day (4 Hours IRS CE)
Members - \$150 / Nonmembers - \$160
Circle one: AM or PM
- Saturday, June 9, 2018 (4 Hours IRS CE)
Members - \$105 / Nonmembers - \$125
- Paper Handouts - \$35** VASEA is going paperless! If you would like paper handouts, please include an additional \$35 with your registration fee.
- This is my first VASEA meeting.
- I am interested in VASEA membership information.

Early Bird Discount - If postmarked on or before **Friday, May 18, 2018** you may subtract \$25 from your total for a "Three Day Seminar" registration.

Late Registration Fee - If postmarked after **Friday, May 25, 2018** please add \$25 to your registration fee.

Total Due: _____

Check - Make payable to VASEA and mail to:
P.O. Box 2873
Mechanicsville, VA 23116

Credit Cards Accepted
VISA, MasterCard, Discover, and AMEX

Credit Card Number _____

Expiration Date _____ Security Code _____

Name on Card _____

Questions? Call (804) 723-5888

Sponsorship Opportunities

Maximize your visibility with over 100 tax professionals at VASEA's biggest tax seminar of the year.

- Meet new colleagues
- Expand your client base
- Create goodwill and build relationships
- Introduce your latest products and services

Lunch Sponsor (2 available): \$750

- Recognition on handouts (Schedule of Events)
- Complimentary Full Page Ad in Program Book
- Recognition on VASEA website
- Complimentary email advertisement to attendees (to be sent by VASEA)
- Attendee mailing list
- One 6 ft Table Top Exhibit Space
- 15 minutes of speaking time following lunch in the seminar meeting room. Speaking day determined by first come, first served.
- One complimentary conference registration.

Breakfast Sponsor (3 available): \$500

- Recognition on handouts (Schedule of Events)
- Recognition on VASEA website
- Complimentary email advertisement to attendees (to be sent by VASEA)
- Attendee mailing list
- One 6 ft Table Top Exhibit Space
- 5 minutes of speaking time after morning announcements. Speaking day determined by first come, first served.
- One complimentary conference registration.

Tabletop Exhibitor (10 available): \$250

- Recognition on handouts (Schedule of Events)
- Recognition on VASEA website
- Attendee mailing list
- One 6 ft Table Top Exhibit Space
- Seminar meals included.

Name _____ Title _____

Company _____

Badge Name / Nickname _____

Company Address _____

Phone(_____) _____ Email _____

Check each of the days you plan to attend: Thursday Friday Saturday

Would you like to donate a door prize? (Check one) Yes No

Total Due:

Check - Make payable to VASEA and mail to: P.O. Box 2873, Mechanicsville, VA 23116

Credit Cards Accepted: VISA, MasterCard, Discover, and AMEX

Credit Card Number _____ Expiration Date _____ Security Code _____