

Name _____ Badge Name/Nickname _____
Professional Designations (EA, CPA, etc.) _____ PTIN _____
Address: _____ City _____ State _____ Zip _____
Phone _____ Email _____
VASEA Member/Associate yes no

Discount Fees:

Early Bird Discount - If postmarked on or before September 30th you may subtract \$25 from your total registration fee.
Late Registration Fee - If postmarked on or after October 16th please add \$25 to your total registration fee.
On-Site or Day-of Registration Fee - On-site or "day of event" registrants, please add \$25 to your total registration fee, in addition to the late registration fee.
See "Registration Information" for firm discounts.

Please check all that apply:

- Best Value! Both Practice Management Seminar & Current Tax Issues Seminar**
Wed-Thur, October 23-24, 2019 (8 Hours IRS CE / 14 Hours NASBA CE) Members - \$250 / Nonmembers - \$315
- Practice Management Seminar – Wed, October 23, 2019 (2 Hours IRS CE / 6 Hours NASBA CE)
Members - \$100 / Nonmembers - \$125
- Current Tax Issues Seminar – Thur, October 24, 2019 (6 Hours IRS CE / 8 Hours NASBA CE)
Members - \$175 / Nonmembers - \$200
- Annual Meeting & Awards Luncheon Only Members - \$30 / Nonmembers - \$40 (no early-bird discount)
- Annual Meeting & Awards Without Lunch Members Only - FREE
- This is my first VASEA meeting. This is my first VASEA Current Tax Issues Seminar.

Dietary Restrictions: _____ Special Accommodations: _____

Total Due: _____

- Check - Make payable to VASEA and mail to: PO BOX 2873, Mechanicsville, VA 23116
 Credit Card - VISA, MasterCard, Discover, and AMEX accepted.

Credit Card Number _____ Exp. Date _____ CVV: _____

CC Holder Name (if not registrant) _____

Billing Address _____

Questions - Call (804) 723-5888

VASEA
VIRGINIA SOCIETY OF ENROLLED AGENTS
P.O. Box 2873
Mechanicsville, Virginia 23116

VASEA
VIRGINIA SOCIETY OF ENROLLED AGENTS

presents
Tax Practice Management
Wednesday, October 23, 2019
10:00 a.m. – 5:00 p.m.
&
Current Tax Issues Seminar
& IRS Problem Solving Day
Thursday, October 24, 2019
7:30 a.m. – 5:00 p.m.

Featuring speakers from IRS, SSA, VTAX, and more!

Four Points by Sheraton - Richmond Airport

4700 S Laburnum Avenue,
Richmond, Virginia 23231

For reservations call:
(888) 627-8644
Reference "VASEA"

CE Credits: 8 Federal Tax
Program Level: Intermediate
Prerequisite: 1-2 Years of Tax Experience
Advance Preparation: None
Delivery Method: Group Live
Field of Study Category:
IRS: Federal Tax Law Topics/
Federal Tax Related Matters – 8 credits
NASBA: Taxes – 14 credits



VASEA is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org.

PRACTICE MANAGEMENT SEMINAR

Wednesday, October 23, 2019

(2 IRS CE; 6 NASBA CPE)

Designed for anyone who owns, manages, helps manage, or is considering launching their own tax practice! This seminar will cover tax research software, tax practice software, cyber security, social media marketing, disclosure, how to “fire” a client, succession planning (it’s never too early to start strategizing), and more!

10:00-10:10 a.m.

Welcome & Explanation of Format

10:10-11:10 a.m.

**Cyber Security for Tax Practices
(1 IRS CE; 1 NASBA CPE)**

This overview course reviews how tax preparers and their clients are prime targets for identity thieves and hackers. This presentation first defines the different types of Cybersecurity Breaches and the different types of Malware. The second part explores the Internal Costs and External Costs and what a professional practice can do reduce its exposure to cyber-attacks. The third part details an in-depth review of new password recommendations as issued by the National Institute of Standards and Technology (NIST) in 2017 that fundamentally changes how a person, or a firm should develop their passwords. The presentation concludes with a best practice review of how to backup any files.

Presented by Vaughan Long, EA.

11:10-Noon

**Social Media Made Easy
(1 NASBA CPE)**

Social Media has become increasingly important to securing new business. However, it can be a complete waste of time when you don’t understand how Social Media really works.

Social Media made Easy will share:

- Psychology of Social Media
- Various Social Media Platforms
- The Flow of Information that Produces Clients
- Best Practices

Presented by LuSundra Everett, EA

Noon-1:00 p.m.

Lunch

1:10-2:00 p.m.

**How & When to Fire a Client
(1 NASBA CPE)**

Being a tax professional can be a tough job as it is, but then add on to that the complications of managing particularly difficult clients and you could potentially have the recipe for failure. Attracting and retaining the wrong kinds of clients can prove to be toxic for your business. For this reason, the question of whether or not you may want to “fire” a client may arise. This presentation will discuss reasons to consider ending relationships with clients and how to do it professionally and ethically.

Presented by Mary Kelly, EA

2:00-2:50 p.m.

Disclosure and POA

(1 IRS CE; 1 NASBA CPE)

This beginner course will identify when you need to use forms 2848, 8821, and 56. Examples will be given to help solidify proper preparation of each of these forms.

Presented by Knox Wimberly, EA.

2:50-3:10 p.m.

20 Minute Break

3:10-4:00 p.m.

**Software Roundtable; What Software Do you use & Why?
(1 NASBA CPE)**

Panel discussion with a solo, medium, and large practice representatives, including Carrie Braswell, EA, Ty Gaines, EA, and Knox Wimberly, EA. Features of the following software and how it is used in a tax practice will be discussed:

- Tax Research Software
- Client Management Software
- Tax Prep Software

4:00-4:00 p.m.

**If You Think It’s Hard Getting Into Business,
Wait Until You Try Getting Out
(1 NASBA CPE)**

This session will discuss how to prepare for a successful exit or transition from your business, regardless of timing or circumstances. Exit planning is not about selling the business; it’s about having a PROCESS of having a strategy of reaching your personal AND financial goals, and protecting your wealth. The challenge is to start preparing NOW, not later, when it may be too late to make a difference. The irony is that the strategies and tools for exit planning will also INCREASE THE VALUE of the business TODAY, not just in the future, even if that future is years away. Having started two businesses that he left without receiving the value he helped create, Jay Cowan didn’t want to see others make the same mistakes he made! So, he offers experience, not just theory.

Presented by Jay Cowan, CLU, ChFC, CBEC.

4:50-5:00 p.m.

Wrap-Up & Closing Announcements

6:00 p.m.

**Optional Group Dinner at Local Restaurant.
Pay “on your own”.**

CURRENT TAX ISSUES SEMINAR & IRS Problem Solving Day

Thursday, October 24, 2019

(6 IRS CE; 8 NASBA CPE)

This annual seminar enables attendees to interact with representatives from Internal Revenue Service, Social Security Administration, Virginia Department of Taxation, and other agencies. This program also gives the taxing authorities an opportunity to provide updates regarding any changes in tax laws or operational procedures planned for the next filing

season. IRS Taxpayer Advocate Service will be on hand to provide account resolution service for attendees. They will have a table and representatives to give on-site personalized step-by-step guidance.

7:30-8:00 a.m.

Registration and Continental Breakfast

8:10-8:20 a.m.

Announcements

8:20-9:10 a.m.

**IRS Taxpayer Advocate
(1 IRS CE; 1 NASBA CPE)**

9:10-10:00 a.m.

**IRS Individual Income Tax Update
(1 IRS CE; 1 NASBA CPE)**

10:00-10:20 a.m.

Break

10:20-11:10 a.m.

**IRS Business Income Tax Updates
(1 IRS CE; 1 NASBA CPE)**

11:10-Noon

**Tax Court Update
(1 IRS CE; 1 NASBA CPE)**

Noon-1:00 p.m.

VASEA Annual Meeting & Awards Luncheon

1:10-2:50 p.m.

**Social Security & Medicare
(2 IRS CE; 2 NASBA CPE)**

What You Need to Know for Tax Preparation: tax related issues regarding Social Security & Medicare; Medicare Signup Penalties; ABLE Act

2:50-3:10 p.m.

Break

3:10-4:50 p.m.

**State Tax Updates:
(2 NASBA CPE)**

DC Office of Tax and Revenue*

Maryland Comptroller*

Virginia Department of Taxation*

*invited

4:50 p.m.

Seminar Concludes

SEMINAR DETAILS

Four Points by Sheraton - Richmond Airport

4700 S Laburnum Avenue, Richmond, Virginia 23231

For reservations call: (888) 627-8644

Reference “VASEA”

Special Room Rate

\$109 per night plus tax for reservations made by Friday, October 4th. Be sure to ask for “Virginia Society of Enrolled Agents” group rate. Reservations made after October 4th are subject to availability and higher prices.

Member Discounts

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

Early Bird Discount

The early-bird deadline is September 30, 2019. See the registration form for discounted rate.

Company Discounts

Companies registering more than two of their employees receive an additional discount after the early-bird 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 the same credit card.

Registration Includes

Seminars, continental breakfast, lunch, refreshment breaks, and handouts in electronic format.

NEW! Electronic Handouts

The Current Tax Issues Seminar has gone paperless. You’ll receive the speaker presentations via email on the Monday prior to the seminar so you may download or print them before the seminar.

Refund Policy

Refunds will be honored if written notification is received by Wednesday, October 11, 2019. A processing fee of \$25 will be deducted from the refund. Cancellations after October 11th will not be accepted. Substitutions are always allowed. “No Shows” forfeit their fees.

Meeting Attire

Meeting attire for attendees is business casual.

Meeting Room Temperatures

Temperatures will vary. Please wear layered clothing. [insert NASBA info]

CE Credit

The seminars qualify for a total of 8 hours of IRS CE credit. Presentations that are not directly related to federal taxation do not qualify for IRS CE. However, those presentations qualify for NASBA credit, and NAEA and VASEA credit.

CE Credits: 8 Federal Tax

Program Level: Intermediate

Prerequisite: 1-2 Years of Tax Experience

Advance Preparation: None

Delivery Method: Group Live

Field of Study Category:

IRS: Federal Tax Law Topics/Federal Tax Related Matters – 8 credits

NASBA: Taxes – 14 credits

Questions

Call VASEA at (804) 723-5888.