APPROVED CONTINUING EDUCATION PROVIDER

2017 NMSEA 16th Annual Up, Up and Away Tax Preparers Convention Albuquerque Registration Form

October 3, 2017   Registration 5—6 pm; Program 6—8 pm

October 4 & 5 , 2017   Registration 7:30 —8 am; Program 8 am —5 pm

Lunch provided Wednesday & Thursday

Location: Indian Pueblo Cultural Center, Room Chaco I & II; 2401 12 th St, ABQ 87104

Up to 26 CPE hours. Silent auction held throughout the convention concluding lunch Thurs.

Make checks payable and return this form to: ***NMSEA, Inc. ,PO Box 30974, Albuquerque, NM 87190-0974.*** *Please use one registration form per attendee.* ***Registration name will be used on CPE certificate****. Register as soon as possible.*

NAEA MEMBER Only--Early Bird Discount (before Sept 15) (please circle one)		(Circle One)
	All **3 days**	$301.00
	Wed ONLY or Thurs ONLY	$168.00
NAEA MEMBER (after Sept 15)(please circle one)	All **3 days**	$351.00
	Wed ONLY or Thurs ONLY	$198.00
NSA/NATP (please circle one)	All **3 days**	$398.00
	Wed ONLY or Thurs ONLY	$217.00
NONMEMBER (please circle one)	All 3 days	$430.00
	Wed ONLY or Thurs ONLY	$235.00

NOTE: If only registering for individual sessions, check off the sessions on page 2 and multiply total hours by hourly fee: ________ hours x $40/hr =** **$_________

If You Are Adding Ethics to Wed ONLY or Thurs ONLY registration OR Adding Ethics to Individual Sessions Registration OR Registering for Ethics only _____NAEA Member $32 ____All Others $42 **$________**

TOTAL **$________**

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Name & **DESIGNATION(S**)(PLEASE PRINT)(NAEA/NSA/NATP Membership #)

____ ____

Address (if paying by credit card**, please use BILLING address on card**)   City   State   ZIP

____ ____________________________ ___________________

Work Phone #   Home Phone #   Email Address   PTIN (required for CPEs)

I prefer to pay by credit card. Please charge my: Visa   or   Mastercard   (please circle card type)

Card No. _________________________Exp Date ____ /_____   Signature ____________________________ Security Code _______

Mail check registrations to address above or fax credit card registrations to Patricia Jenkins (Education Team) 505-884-1472 (ALB).

Date	Seminar	Presenter	Time	Attending All 3 Days √	Wed Only √	Thurs Only √	Individual Seminars √
Oct 3 Tues	Ethics	Diane 'Lynne' Shupp, EA	6pm-8pm				
Oct 4 Wed Morning Session	Gig Economy (Pt 1)	Larry Zimbler, EA	8am-10am				
Oct 4 Wed Morning Session	Gig Economy (Pt 2)	Larry Zimbler, EA	10am-Noon				
Oct 4 Wed Session A	Reporting Sales & Payroll	Roxanne Augenstein, EA & Patricia Jenkins, EA	1pm - 3pm				
Oct 4 Wed Session C	Innocent & Injured Spouse	Jeff Augenstein, EA	1pm - 3pm				
Oct 4 Wed Session B	Beyond QF & Taxbook	Ruth Tribou, EA	3pm - 5pm				
Oct 4 Wed Session D	Social Security Issues	Brad Yablonsky	3pm - 5pm				
Oct 5 Thurs Morning Session	Recognizing & Resolving Conflicts of Interest	Jeff Augenstein, EA	8am - 10am				
Oct 5 Thurs Morning Session	IRS Private Debt Collection ——————————— NAEA: What's Happening	Jeff Augenstein, EA ————————— Justin Edwards, NAEA	10– 11am ————- 11– Noon	——————	——--	———-	——————--
Oct 5 Thurs Session A	Casualty Losses: Personal vs Business	Patricia Jenkins, EA	1pm - 3pm				
Oct 5 Thurs Session C	S-Corps 2% Shareholder: Fringe Benefits Rules & Reimbursements	Larry Zimbler, EA	1pm - 3pm				
Oct 5 Thurs Session B	S-Corps: Shareholder Basis	Larry Zimbler, EA	3pm - 5pm				
Oct 5 Thurs Session D	Representation of the Non-Filer	Jeff Augenstein, EA	3pm - 5pm				

Refund policy: Refund (minus $10 cancellation fee) on cancellations received 7 days or more prior to seminar. Cancellations due to illness or emergency received less than 7 days prior will receive partial refunds only by NMSEA board approval. No refunds for "no shows."

NMSEA has entered into an agreement with the Office of Professional Responsibility, Internal Revenue Service, to meet the requirements of 31 Code of Federal Regulations, sec 10.6(g), covering maintenance of attendance records, retention of program outlines, qualifications of instructors and length of class hours. This agreement does not constitute an endorsement by the Director, Office of Professional Responsibility as to the quality of the program or its contribution to the professional competence of the enrolled individual. NMSEA's Provider Number is 4P43V. CE is voluntary for everyone except EAs, ERPAs, and CPAs. This seminar also qualifies as CPE for ABA, ATA, ATP and CB (Certified Bookkeeper) designations.

PRESENTER BIOGRAPHIES

Patricia "Pat" Jenkins, EA, ABA, NTPI Fellow, NMSEA has been a tax professional for 40 years. She also has background in accounting, finance and insurance. She became an Enrolled Agent in 1990. She worked for a large tax corporation from 1983 to 2005, where she held many positions including tax preparer, office manager and tax class instructor. Since December 2005, she has owned her own business. She specializes in small businesses and in IRS and NM representation. She is a member of NAEA, NMSEA, NATP and NSA. She passed the exam to earn her Accredited Business Accountant (ABA) designation in 2005. She has taught taxation, accounting and QuickBooks classes at the Santa Fe Community College. She has presented many seminars for NMSEA in the past 20 years. She has done IRS Workshops for the past 9 years. She served two terms on the NAEA Ethics Committee, 13 terms as Treasurer, NMSEA three years as President, NMSEA, and is currently Past President.

Lynne Shupp, EA, RFC, NMSEA is the owner of J&L Tax Services in Albuquerque, NM. Lynne has been an Enrolled Agent (EA) since 2012 and has been preparing tax returns professionally since 1989. In addition, she is a Registered Financial Consultant (RFC®). She is a member of NAEA and NMSEA. Currently, she serves on the Board of NMSEA and has previously served as a director on the CTEC Board in California. Lynne holds a Bachelor of Science degree in Management and Finance. She previously owned a financial planning and tax service in California and now owns a tax planning and preparation service in Albuquerque.

Ruth Tribou, EA, NTPI Fellow, NMSEA has a B.S. in Chemical Engineering from California Polytechnic University, Pomona, and has completed coursework towards an MBA at Cal State Long Beach. She has been doing taxes since 1986, and earned the Enrolled Agent designation in 1992. For the first seventeen years of her career, she worked for a major tax preparation firm, where she also served as an instructor and as public relations coordinator. From 2003-2007 Ruth volunteered for AARP Tax Aide, serving two years as state training specialist. Since 2003, Ruth has been the owner of her own tax and bookkeeping business. She is active in the United Methodist Church and many other non-profit organizations both on a paid and volunteer basis. Ruth is married, with three adult children, and loves to travel in the off-season.

Jeff Augenstein EA, NTPI Fellow, AzSEA became a tax professional in 1996 preparing 1995 tax returns. He furthered his career in 2002 by passing the Enrolled Agents Exam and becoming an Enrolled Agent. Over the years, he has achieved many other accomplishments to further his tax career. One of his proudest moments was becoming a graduate of NTPI (National Tax Practice Institute). He has also attended some of the top tax seminars in the country. He has had the pleasure of developing and teaching many classes on such topics as: foreign tax issues, capital gains and losses, sales taxes, employment taxes, and employee vs contractor. Teaching has been very rewarding as it allowed him to pass on a vast array of knowledge to others.

Roxanne Augenstein, EA, AzSEA My husband Jeff and I started Northern AZ Financial Services in 2003 after I spent 7 years doing taxes at a well-known tax preparation chain. In 2004, I passed the Enrolled Agent Exam, and in 2005 achieved the Enrolled Agent status. As the years have progressed with the business, it became evident that there was a need to provide payroll/bookkeeping services for clients so learned the payroll and sales tax process. I prepare tax returns but spend most of my time processing payroll, payroll taxes and sales taxes. Once a year I get the joy of creating W2's for employees and the Social Security Office. My office handles many representation cases. When we get a case that involves payroll/sales tax problems, I help resolve those cases.

Lawrence Zimbler, MST, EA, MISEA has been involved in the tax profession since 1975. He spent just under ten years with IRS in a variety of technical and managerial positions in the Detroit District and (former) Midwest Regional Office. Additionally, he has ten years experience in the tax software industry, spending six years as head of technical support and 3 years as a senior programmer/analyst for a national tax software development company. He has been in private tax practice since 1985. Clients include individuals, small businesses, trusts, estates and non-profit organizations. He has successfully represented clients before IRS collection, examination and appeals divisions on issues such as offers in compromise; the accumulated earnings tax; innocent spouse claims; and has successfully obtained private letter rulings and tax exempt status for organizations. He holds a Bachelor of Science Degree in Mathematics and a Master of Science Degree in Taxation. He has passed all parts of the CPA examination, but is not currently licensed. He is enrolled to practice before the Internal Revenue Service and is a member of NAEA and NATP (serving on the Michigan Chapter Board of Directors and as State Chapter Treasurer). He teaches tax continuing education as a national instructor for the National Association of Tax Professionals; and independently for various other tax related organizations across the United States. He is an active volunteer leader with the Boy Scouts of America earning the Silver Beaver Award, the OA Founder's Award and is a James E West Fellow.

Justin Edwards, Associate Director of Government Relations, NAEA, I have worked in the Washington, DC metro area for more than ten years. My experiences here in Washington have helped me become a heavily detail- and results-oriented government relations professional with over ten years of skills and experience in issue advocacy; coalition building; legislative, regulatory and judicial advocacy activities; public affairs; and political fundraising management. I am currently the Associate Director of Government Relations for the National Association of Enrolled Agents (NAEA), an association that represents more than 50,000 federally-licensed tax practitioners with unlimited practice rights to represent U.S. taxpayers and small businesses before the IRS when it comes to audits, collections and appeals. I help represent NAEA members before Members of Congress, the IRS (e.g., IRS Communications & Liaison Division, Return Preparer Office, Office of Practitioner Enrollment, Office of Professional Responsibility, and the Office of the Taxpayer Advocate), state legislatures, and state regulatory bodies.

Bradley Yablonsky, Financial Advisor, UBS Financial Services, Inc As the Account Vice President, I currently support a team of three financial advisors and supervise two sales assistants in overseeing approximately $450 Million in client assets. Through careful listening, I work with my clients to identify opportunities to utilize UBS' resources and investment solutions to meet their financial expectations. As a Financial Advisor, I am passionate about helping my clients develop a viable life plan and achieve financial stability. My extensive background in coaching and philanthropy provides me with the necessary skills to guide clients into making comprehensive decisions regarding their financial future. My specialties and finance expertise include: Financial planning via the Financial Goal Analysis (FGA) which includes Social Security Education, Medicare Planning, Financial Planning and Wealth Management. I also focus on Client Acquisition, Cash Flow Strategies, Business Development, Client Relations, Marketing, and Philanthropy. In addition I am Series 7, Series 66 and Insurance Licensed.

Seminar Descriptions	**CPE Hours**
Ethics—Exploring Circular 230.	2
Gig Economy (Part 1)—Will cover UBER/LYFT and Air BNB.	2
Gig Economy (Part 2)—Will cover crowd funding & virtual currency.	2
Reporting Sales & Payroll—for clients with NM, CO, AZ locations.	2
Innocent & Injured Spouse—When does Innocent Spouse or Injured Spouse apply?	2
Beyond QF (Quickfinder) & TheTaxBook—How to defend at audit with tax research.	2
Social Security Issues—Covers when to apply and how to apply.	2
Recognizing & Resolving Conflicts of Interest—Teaches the taxpayer how to recognize and resolve	2
IRS Private Debt Collection—The new IRS private debt collection procedures and rules.	1
NAEA: What's Happening—What's new on Capitol Hill.	1
Casualty Losses: Personal vs Business—Review of personal & business losses and how to report them.	2
S-Corps 2% Shareholder—What a 2% S-Corps shareholder can do with fringe benefits & reimbursements.	2
S-Corps Shareholder Basis—How to figure shareholder basis.	2
Representation of the Non-Filer—ABCs of representing the non-filer taxpayer.	2