



NMSEA's 2022 (21st) Annual Conference

NMSEA is offering 16 CE hours. Either attend Virtually or In-Person (your choice)

Courtyard by Marriott, 5151 Journal Center Blvd NE, Albuquerque, NM 87109

Hotel Discount Code: Call hotel at 505-823-1919. Code is **NMSC**

Wednesday 10/26/22 Social Event 5pm (see details on Schedule Page)

Are you planning to attend the Social Event? Yes _____ No _____ Number of attendees _____

Thursday 10/27/22 & Friday 10/28/2022 7:30 AM – 5 PM

Early Bird NMSEA member expires 10/01/22 \$300.00

Select quantity _____ x \$300.00 = \$ _____

Late Bird NMSEA member after 10/01/22 \$350.00

Sales start on Oct 2, 2022 **Select quantity** _____ x \$350.00 = \$ _____

Early Bird non-member expires 10/01/22 \$350.00

Select quantity _____ x \$350.00 = \$ _____

Late Bird non-member after 10/01/22 \$400.00

Sales start on Oct 2, 2022 **Select quantity** _____ x \$400.00 = \$ _____

Printed Materials Sales end on Oct 27, 2022 \$70.00

Select quantity _____ x \$70.00 = \$ _____

Ethics (single session) Sales end on Oct 27, 2022 \$50.00 [You can enroll in only this session if desired]

Select quantity _____ x \$50.00 = \$ _____

To Register for the Convention either:

1. Save the Eventbrite Fee (\$19.89 - \$25.98). Complete this registration form and submit:

Mail to NMSEA, PO Box 30974, ABQ, NM 87190-0974 Or **Fax** to 505-298-2191

Or

2. Register online at Eventbrite www.tinyurl.com/NMSEA-2022-Oct-Conference

NOTE: Registering online incurs Eventbrite fee as shown on the Ticket webpage.

Name _____ PTIN _____

Member of NMSEA? Yes No Attending? Virtually In Person

I prefer to pay by credit card. Please charge my Visa _____ MC _____ Amer Ex _____

Card# _____

Expiration date _____ Security Code _____ Zip Code _____

Email _____ Phone # _____

Signature _____

Featuring the following in-person presenters:

Ellen Briscoe, EA, ATA - Trusts and Preparing the 1041 Tax Return (6 CE)

Last year, Ellen's discussion emphasized the theory of the Trust return. This year she will be offering some examples with a hands-on approach as to how to complete the 1041.

Lelah Martinez - IRS Liaison Report (1 CE)

Lynne Shupp, EA, RFC - Last Chance Ethics (this session is available to purchase by itself) (2 CE)

Are you working virtually with any of your clients? Does that ever change your Due Diligence requirements? Are you sure that the information that you & the taxpayer are sharing is secure?

Ruth Tribou, EA – IRAs (2 CE)

This session will help you understand some of the new requirements of the SECURE Act. You will finally be able to state who is an Eligible Designated Beneficiary (EDB) vs who is a Non-Eligible Designated Beneficiary (NEDB) vs Non-Designated Beneficiary (NDB) and why this classification matters. In addition, we will cover topics like taxable QCDs, why leaving your IRA to a trust is no longer the best estate planning idea, and pros & cons of rolling your company retirement plan into an IRA.

Ruth Tribou, EA - Casualty Loss Deductions (2 CE)

We all thought that deductions for casualty losses was gone after the TCJA of 2017. The truth is that the deduction is still there. In this workshop we will learn what qualifications are necessary to have a casualty loss, how to calculate the amount of the deduction, how you can deduct casualty losses even if you don't itemize your other deductions and how NM's fires qualify for this treatment. We will also cover how to deduct Ponzi Scheme losses, with or without using the safe-harbor method.

Brad Yablonsky - Social Security Issues (3 CE)

Brad is one of our very favorite speakers. Last year, he ran out of time and could not get all of his presentation completed or answer all of our questions. We have invited him back to continue the discussion.

NMSEA's October Conference 2022

Wednesday, October 26, 2022

5 pm -	Social Event for all	Restoration Pizza, 5161 Lang Ave, NE, ABQ Short walk from the Courtyard by Marriott Hotel
--------	----------------------	-----------------------------------------------------------------------------------------------------

Thursday Oct 27, 2022

7:30 – 8:00 AM	Registration & Welcome	
8 AM – 8:50 AM	IRS Liaison Report (1 CE)	Lelah Martinez
8:50 – 9 AM	Break	
9 – 11:30 AM	Social Security Issues (3 CE)	Brad Yablonsky
Lunch		
1:00 – 2:40 PM	Trust Returns (2 CE)	Ellen Briscoe, EA
2:40 – 3 PM	Break	
3 – 4:40 PM	Ethics (2 CE)	Lynne Shupp, EA

Friday Oct 28, 2022

7:30 – 8:00 AM	Registration & Welcome	
8 AM – 9:40 AM	Trust Returns (2 CE) (continued)	Ellen Briscoe, EA
9:40 – 10 AM	Break	
10 – 11:40 AM	Trust Returns (2 CE) (continued)	Ellen Briscoe, EA
Lunch & Auction		
1 - 2:40 PM	Retirement & IRAs (2 CE)	Ruth Tribou, EA
2:40 – 3 PM	Break	
3 – 4:40 PM	Casualty & Disaster Losses (2 CE)	Ruth Tribou, EA