



National Association
of Tax Professionals | **ALABAMA
CHAPTER**

ALABAMA CHAPTER National Association of Tax Professionals

Volume 2, Issue 3

September 2012



Deb Lewis, Vice – President AL NATP; Owner: Village Tax Team

Vice President’s Message: CHAPTER OF THE YEAR???

Can you believe the end of summer is here? I recently returned from my very first National NATP conference and it was an exciting, informative and hectic event. It was in the city of Baltimore, Maryland, which is much cleaner than I expected. Our events were held at the Marriott on the waterfront and my room overlooked the lovely harbor. I cannot say enough good things about the classes offered. They were outstanding in every aspect. My biggest complaints were the heat; (They had a record breaking heat wave! I could not have gotten away from the heat in

Alabama either.) the high cost of food in some places (which I was able to circumvent by hoofing it a few blocks from the hotel) and the hectic pace of things. Ok... so I thought I was going on a vacation and it turned out to be a *real tax conference!*

At any rate, I was proud to see that we had a large group of Alabama members in attendance and we had the privilege of seeing some of our old friends from Mississippi and make some new friends.

Bo and Wes worked the convention like seasoned politi-

cians, talking up our Alabama Chapter and our Spring Fling Conferences.

ONCE AGAIN, our Chapter received accolades as one of the best Chapters in the Nation. BUT we did not receive the Chapter of the Year Award... but we were right there in reach of it. So that got me to thinking... *Why can't we BE Chapter Of The Year?* I believe we can. It will take the help of everyone of us but we're so close, and have been for several years, that we just need to jump on this and push our way to the top.

Continued on Page 2, VP's Chapter of the Year....

Special points of interest:

- Member recognition for 25 years of Service
- Making a child's Christmas perfect!!!
- New member Welcome
- Submission Request for Round Table Discussion Questions
- Annual Membership Meeting & Fall Education Conference Information & Registration

PTIN Information Directory Request

PTIN Directories

Third party, for profit organizations have obtained the PTIN list under the *Freedom of Information Act* (FOIA) and created an online directory of tax professionals. The IRS is aware of these types of directories and released a statement that the information was obtained legally and there is nothing that they can do to prevent them from creating these directories. The information that they are given includes names, addresses and phone numbers, but not actual PTINs. We want to warn you not to provide these websites with your PTIN, as that may lead to fraudulent use of PTINs. * Reprinted from NATP Taxpro Weekly, September 20, 2012.



Is this legit or not?
Do I or Don't I?



Mrs. Lorene Reed, AL Chapter Treasurer; shown here with her 25 Year Membership Certificate.

VP's Chapter of the Year Continued

During our November meeting in Birmingham, we'll cover this a little more. Letting you in on exactly what YOU can do to help push us to the TOP.

Remember that anything you do for the general public as a tax professional is important; awards received, radio shows, anything you do for our Chapter is important; anything you do that mentions

MEMBERSHIP HIGHLIGHTS:

Twenty-Five Years of Service!!!
Thank you Mrs. Lorene Reed!

Mrs. Lorene has been a member of the Alabama Chapter NATP (Formerly AL/MS Chapter) since the beginning. During this time she has faithfully served as the Chapter Treasurer and has been on the AL Board of Directors. She was awarded Chapter Person of the Year 2001-2002.

As spokesperson for the Board in the newsletters, we are taking this opportunity to congratulate and send our sincere appreciation for all of your hard work, Mrs. Lorene!

The following is a brief outline of Mrs. Lorene's work history and accomplishments during her career.

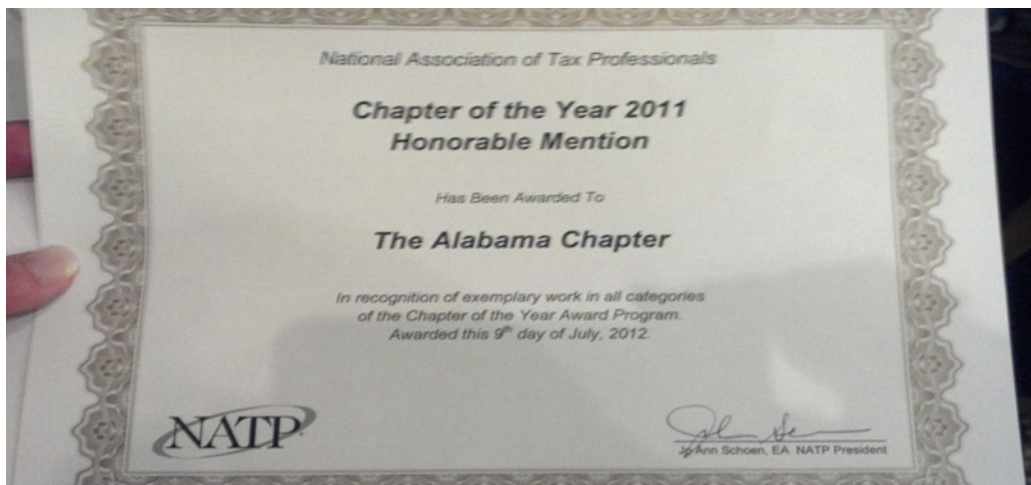
For additional Important Membership News, See Bottom of Page 3 ...

Lorene R. Reed, CAP

She was born in Tuskegee, Alabama. Received elementary and secondary education in the Macon County School System. Attended Alabama State College (now University) with a concentration in Elementary Education and Auburn University (Auburn and Montgomery), Alexander City Jr. College (now Central Alabama Community College with a concentration in accounting, computer and data processing, and office machines. She holds a Certified Administrative Professional Rating CAP (Part IV Accounting) since 1987.

Began working part-time in 1968 as typist for an accountant who owned Blakemon's Accounting and Tax Service, learning the preparation of taxes (income, sales and payroll). The owner/accountant passed away in 1972 and Lorene inherited the business and has been successfully operating her own business since that time.

Lorene is also a long standing member of The International Association of Administrative Professionals (IAAP) and a member of St. Joseph Catholic Church, Tuskegee, Alabama.



NATP is important; getting new members is important. ***So be sure to tell us about it!*** Drop a note to one of the Board Members or committee chairpersons. **WE CAN DO THIS! Alabama CAN be Chapter of the Year!**

SO that's how it all looks from my point of view. See you at the Annual Meeting and Fall Education Conference November 8 &

9, 2012, Embassy Suites, Birmingham, (Hoover) Alabama. Any questions or comments regarding Chapter of the Year or the upcoming Fall Conference please call me, or any other Board Member. Board Member contact information is listed on Page 5.



ANNUAL MEMBERSHIP MEETING AND FALL EDUCATIONAL SEMINAR

The EMBASSY SUITES — Birmingham/Hoover, Alabama

November 8 & 9, 2012

Make your plans NOW to attend your Annual Membership Meeting and Fall Educational Seminar. Its just around the corner, so register today and be sure to reserve your motel room as soon as possible as these rooms go fast!

The Embassy Suites, 2960 John Hawkins Parkway, Birmingham, AL 35244;

Telephone numbers are local 205-985-9994 or 1-800-EMBASSY (Toll Free)

Prior to October 15th... Use Group Code is "TAX".

Special sleeping room rates have been arranged \$139/double occupancy.

Members please plan to attend the Annual Membership Meeting. This is your opportunity to support and have an impact on your NATP Chapter. There are 5 positions on the AL-NATP Board of Directors either up for renewal or to be filled this year. Show your interest in your Chapter by attending the membership meeting and casting your vote.

Any active member interest in serving your Chapter as a Board Member or would like to recommend a fellow member, please send a statement detailing your practice and/or employment along with your professional affiliations and designations, a brief summary of your reasons for being interested in a Board Position, the leadership skills you will bring to your Chapter and *a copy of your current membership card.*

Also, remember we are in great need of Committee Chairpersons and Committee Members willing to work for your Alabama Chapter! Please send the requested information to the nominating committee: ; Al Klang at alstaxservice@centurytel.net; or Bo Young at Bo@afm-inc.com; Dorothy Atchison at abctax@earthlink.net.

IMPORTANT MEMBERSHIP NEWS...

Deb Lewis, our Vice-President and Membership Chairperson is currently working on putting together a "New Member Welcome Packet/Kit"

These packets will contain information about the benefits of being an NATP member and other items from the Alabama Chapter, to name just a few... an Alabama Chapter Lapel pin, Alabama Chapter Coffee Mug, Alabama extra large Magnetic Clip and the list continues....

The Alabama Board of Directors welcomes the following new members:

June 2012

Alma Bermudez, Russellville, AL
Sharon Collett, Ashville, AL

August 2012

Marianne Self, Helena, AL
Jamella Stroud, RTRP, Moody, AL
Kerry Warner, RTRP, Huntsville, AL

July 2012

Brenda G. Blevins, ATP, Huntsville, AL
Donald William Koontz, Jr., Elberta, AL
Meredith L. Prickett, Birmingham, AL

We welcome you & look forward to meeting
each of you in the very near future!



Hand of Friendship!!

Fall Education Tentative Class Agenda...

Fall 2012 Education Tentative Class Agenda, subject to approval by National and the new IRS CPE Provider Program.

As most of you know the IRS has implemented a new CPE provider program, therefore, we are unable at the present time to print an actual Agenda until final approval has been received. BUT, currently we are seeking approval for the following subjects, of which, *not all will be CPE (continued professional education) accredited*:

- Information on the new E-Verify Program by Paul Young;
- 2012 Federal Updates by IRS Agent Nora Huffman;
- Schedule C Sole Proprietor preparation with the pros and cons of Schedule C filing by Kathy R. Hallford;
- Interview of your clients and Closure for their tax returns by Roger Horton;
- Round Table Discussions from previously submitted questions by the current AL Board of Directors;
- Exemptions: Personal & Dependent by Deidree Jones;
- Fish Philosophy for Success by Al Klang;
- 2012 Alabama Department of Revenue Updates by ADOR Representatives;
- Greetings from NATP National Office by NATP National Representative William Pate, JD;
- Sit-Down Luncheon on Thursday
- Meet and Greet Networking on Thursday after the membership meeting in the lobby/lounge area.
- Fabulous door prizes provided by the AL Board of Directors (All new approach to the door prizes this fall)
- Bring your business cards for the door prizes and the networking!

Also this year we will have a couple vendors attending. ATOM Software will be presenting a tax office management software to help manage your tax office and move your office into the paperless world; and Alabama Copiers will be presenting copiers, scanners and toner for those necessary printed documents.

Make plans now to stop at their tables and view the products they are offering that will enhance your tax practices and take advantage of their conference specials!

Your Education Committee and Board of Directors have spent time preparing for this conference, so please send your **Registration Form and money in today!** The Registration Form is Page 6 of this newsletter. Copy as needed.



Alabama's Children's Hospital Birmingham AL

Have you ever wanted to help one of those children that were sick and you felt helpless to find the perfect way to do so?

!!!! Well here is your chance !!!!



The AL NATP Board is respectfully requesting that each attendee bring with you a New Un-Wrapped Toy or Game to Fall Education Conference! This is a simple but effective way for our Chapter to bring great joy to many, many hurting children! Thank you in advance for your generosity! A Representative from the Children's Hospital will be available to accept your gifts for Christmas distribution.

Recommended value \$10 to \$15 each. (Feel free to bring more than one gift!)

***** Upcoming Round Table Discussion *****

We need your participation in order to make this session interesting and helpful! Here is your opportunity to get some answers to those unusual situations your not sure what to do with or how to handle. Send your questions in NOW to any AL Board Member, so that we may properly prepare an answer with References to IRS Code, Publication etc. AL NATP Board of Directors contact info below.

President: Shirley Lloyd-Bolt, EA
334-297-3209

Shirley@shirleysacct.com

Secretary: Kathy R. Hallford, EA
251-843-5153, 251-605-0644

taxkween61@yahoo.com

Additional Board of Directors:

Dorothy Atchison, EA
251-246-9383

abctax@earthlink.net

Douglas J. Crump, EA
205-556-0042

djcrump@rrbusiness-solutions.com

Al Klang, RTRP
334-393-3860

alstaxservice@centurytel.net

Beauford "Bo" Young
205-987-8700

bo@afm-inc.com

Vice-President: Deborah "Deb" Lewis, EA
256-435-9966

teamdeb@cableone.net

Treasurer: Lorene Reed, CPS
334-727-5132

r_lorene@bellsouth.net

Earlene Clayton, PA
334-683-6159

earlytax@earthlink.net

Roger W. Horton, Jr.
334-244-8722

ohnotaxes@aol.com

Wesley A. Mott, Sr., EA
251-478-6044

pastormott@yahoo.com

Paul Young
205-987-8700

paul@afm-inc.com



Back Row: Wesley Mott, Al Klang, Roger Horton, Dorothy Atchison, Earleen Clayton, Bo Young and Paul Young

Front Row: Kathy Hallford, Lorene Reed, Shirley Bolt and Deb Lewis



National Association of Tax Professionals | ALABAMA CHAPTER

ALABAMA CHAPTER
NATIONAL ASSOCIATION OF
TAX PROFESSIONALS

**ANNUAL MEMBERSHIP MEETING and
FALL EDUCATION CONFERENCE**

November 8 & 9, 2012

EMBASSY SUITES, 2960 John Hawkins Parkway, Birmingham, AL 35244;

Telephone numbers local 205-985-9994 or 1-800-EMBASSY (Toll Free)

Special room rates arranged \$139/night prior to October 15th, use Group Code "TAX"

REGISTRATION FORM

NAME & Professional Designation(s): _____ **PTIN:** _____

ADDRESS: _____

PHONE: () _____ **E-MAIL:** _____

MEMBER NATP? YES or NO _____ **Member Number** _____ **Other Orgs:** _____

***** 8 CPE CREDITS*****



APPROVED
CONTINUING EDUCATION
PROVIDER

IRS PROVIDER # 9ZMJ7

*****The number of Continuing Professional Education credits is as stated for RTRP & EA and is currently under review. "The number of hours of Continuing Professional Education may be subject to interpretation, and ultimately, it is the responsibility of each Circular 230 Practitioner to understand and comply. Different Professional organizations may have different requirements/specifics for qualifying Continuing Professional Education Credits."*****

The Educational AGENDA will accompany this registration form either by attachment or included in an Alabama Chapter Newsletter. Registration Fee for NATP Members is **\$125.00**, if paid and received by **October 30, 2012**. If paid and received **AFTER October 30, 2012**, the fee for NATP Members will be **\$150.00**. **NON MEMBERS ARE WELCOME!** Registration fee for **NON MEMBERS** is **\$150.00**, if paid and received by **October 30, 2012**. If paid and received **AFTER October 30, 2012**, the fee for **NON MEMBERS** is **\$175.00**. The paid registration fee **does** include a sit-down Luncheon for **one** person on Thursday, November 8, 2012. To secure lunch for additional person(s) add \$20.00 for each additional person to your registration fee.

CANCELLATIONS: There will be **NO** refunds of paid registration fee after October 30, 2012. Written Cancellation for paid registration fee received on or prior to October 30, 2012 (postmark date will apply) will have a \$50.00 charge withheld from refund for administration costs. ***** Don't forget your "unwrapped" toy or game!*****

FOR MORE INFO CALL:

Wesley Mott 251-478-6044
Kathy Hallford 251-843-5153
Deb Lewis 256-435-9966
Shirley Bolt 334-297-3226

Make Payment (checks only) of registration fee to:

AL CHAPTER NATP – C/O : Lorene Reed, Treasurer
PO BOX 830244, Tuskegee, AL 36083-0244
Tele: - 334-727-5132 e-mail: - r_lorene@bellsouth.net



ALABAMA CHAPTER NATIONAL ASSOCIATION OF TAX PROFESSIONALS
The NEW EMBASSY SUITES – Birmingham/Hoover, Alabama

November 7-9, 2012
APPROVED AGENDA

WEDNESDAY, NOVEMBER 7, 2012

4:00PM – 5:00PM	Education Committee Meeting	Wesley Mott, EA, Ed. Chairman
6:00PM – 8:00 PM	Board of Directors Meeting	Directors

THURSDAY, NOVEMBER 8, 2012

7:30AM – 7:50AM	Registration	Registration Desk
7:50AM – 8:00AM	Welcome and Opening Remarks	Shirley Bolt EA, President
8:00AM – 8:50AM	2012 Federal Updates	Nora J. Huffman – IRS
8:50AM – 9:40AM	Ethics - Good Practice Procedures	Al Klang, RTRP
9:40AM – 10:00AM	BREAK	
10:00AM – 10:40AM	Form Updates (1099-K & 1099-R)	Dorothy Atchison, EA
10:40AM – 11:30AM	E Verify	Paul Young
11:30AM - 1:00PM	LUNCH – Lunch <u>PROVIDED</u> (Sit Down Lunch)	
1:00PM – 1:50PM	Fish Philosophy	Al Klang, RTRP
1:50PM – 2:40PM	Schedule C	Kathy Hallford, EA, RTRP
2:40PM – 3:30PM	Interview & Closure	Roger Horton, NATP Certified Instructor
3:30PM - UNTIL	Annual AL Chapter NATP Membership Meeting	Shirley Bolt EA, President

FRIDAY, NOVEMBER 9, 2012

7:30AM – 7:50AM	Registration	Registration Desk
7:50AM – 8:00AM	Opening Remarks	Shirley Bolt, EA, President
8:00AM – 8:30AM	NATP National Representative	William Pate, JD
8:30AM – 9:40AM	Round Table Discussion	AL Board of Directors
9:40AM – 10:00AM	BREAK	
10:00AM – 10:50AM	Exemptions – Personal & Dependent	Deidree Jones
10:50AM – 11:40AM	Alabama Dept. of Revenue – Income Tax Division	ADOR Representative
11:40AM – 12:20PM	Closing Comments	Shirley Bolt, President
	Door Prizes	Wesley Mott, EA, Ed. Chairman



APPROVED
CONTINUING EDUCATION
PROVIDER

Our Spring Fling (2013) Meeting is at the NEW Hampton Inn and Suites,

Orange Beach, AL – On the Beach

May 6-8, 2013 –*Two (2) for One (1) Pricing & Early Registration Discounts

***Invite an employee, friend, and/or competitor at no increase in cost.**

LIMITED TO THE FIRST 250 REGISTRANTS – So be sure and register EARLY!

**Non-Members registering for NATP Membership at Fall Conference will
Receive a \$25.00 Discount on Alabama Spring Fling 2013 Conference Registration!**

**Two for one pricing limited to non-members and/or members that have not attended a conference in the past three years.*