



Letter from the President

April Bittle-Kurzke

Dear Virginia NATP Chapter Members,

BOARD OF DIRECTORS

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My year as your Chapter President has been challenging and rewarding.

I was fortunate to attend a Representative Summit in Appleton, WI on May 6. There were attendees from every state chapter. During this time we participated in "Brainstorming Discussions" on the following topics: Regulations, Education Competition, Conference Events, Member Events, Member Communication, and Volunteers.

The purpose of the Summit was to discuss the successes and difficulties each Chapter is having and to share ideas. One change Virginia Chapter has made was to use emails instead of mailings for Newsletters and member correspondence. I do want to apologize for the mishap the first time the Newsletter was sent. Unfortunately, members' addresses were sent to ALL.

Much discussion was about the survival of NATP Chapters. NATP is a not for profit organization. That means, **WE NEED VOLUNTEERS**. We are looking for members to serve on the Board, Committees, to instruct, or to share any Special Talent (examples putting together the Newsletter, contacting Vendors for our conference, or helping at Conference.) Any time you can spare would be greatly appreciated.

On May 8, we had a Board meeting in Richmond. During this time we toured the Westin, Four Points by Sheraton and other hotels to be considered for our 2016 conference.

I attended the National Conference in July held in New Orleans, Louisiana. The education topics and instructors were awesome. It is an event I encourage each of you to consider attending. The Louisiana Chapter organized a short dinner cruise on the Mississippi River and after the conference I stayed another two days to tour the city. What a city!

Thanks to Member Chad Porter, we are able to have Jeremy Armstrong speak at our conference in November. Mr. Armstrong is the Manager of the Customer Service Contact Center for the Virginia Department of Taxation. He will be addressing tax updates and other pertinent information pertaining to tax preparers.

from page 1

There have been challenges with our website: www.virginianatp.com. There were complaints from members on difficulty in registering for the conference and receiving Chapter correspondences. These issues have been corrected and we are continually looking for ways to improve the site.

Another challenge was finding instructors. Any Member wanting to obtain their teaching credentials through NATP, I strongly encourage you to do so. If you are knowledgeable or have a specialty in a tax area, we need you! Please contact me for more information.

During my term as President, I made available a Chapter Leadership Manual. The Manual was constructed by National and I simplified it by summarizing individual committee responsibilities as well as short term jobs. The purpose of the Manual is to help us as VOLUNTEERS know what to do and when it should be done.

Online training from National is provided free of charge for NATP members. The Virginia Board completed the "BOLTS TRAINING"- Building Our Leadership Team Seminar, consisting of a minimum of four webinars of their choice.

This year we were able to distribute three Newsletters and we are striving for at least four next year. We ask Members to submit tax or other related articles to be published in the Newsletters. This is your newsletter and any recommendations you can make to make it more useful will be appreciated.

The Board discussed having one day seminars in Northern Virginia. Possible topics would be "Boarding States" tax related issues and "IRS Updates". In order to proceed with the idea, we need a VOLUNTEER to organize the event.

The most rewarding aspect as Virginia Chapter President was working with YOU- THE MEMBERS OF NATP. I appreciate the support and encouragement you have given me and I look forward to continuing to meet and getting to know each of you. If you don't know me, please introduce yourself at our conference and if you can't attend, please call me at 908-295-9730.

Sincerely,
April Bittle-Kurzke
2015 Chapter President
National Association of Tax
Professionals



EARN 17 CPE CREDITS!!!

2015 VA Chapter Annual Conference

The Virginia Chapter / NATP will hold its annual
state

conference on

**Thursday and Friday, November 5 and
6, 2015**

at the

**Doubletree Hotel by Hilton, Williams-
burg, VA**

757-220-2500

ONLINE REGISTRATION AVAILABLE AT

www.virginianatp.com



2015 New Members!

Welcome to the Virginia NATP! We are delighted that you have joined us and trust that the benefits of membership will meet your expectations. We are pleased to add active, enthusiastic members like you to the chapter, and look forward to many years of rewarding association. Our board of directors is receptive to new ideas. This year's president, April Bittle-Kurzke, and any of the board members, will be happy to hear from you. Don't hesitate to call or write!

Hamida Abawi	Laura Tate-Smith
Jenny Carter	Juanita Thomas
Samuel Foltz	Rufe Vanderpool
Renee Joy	Cynthia Lynn Wyman
Musheerah Kolen	Andrea Zank
Maria Kos	Kim Martin
Charles Wayne Loker	Andrew Spencer Pegram
Eric Moore	Jerry Stein
Robert A Morse	Evan Allen Swank
Maruja Pabalan	
Megan Ross	
Iris Wang	
Robin Genna Wixom	
Paul Allen	
Christina Villaroman Banagan	
Kimberly Johnson Britton	
Roy Burgess	
Lesley Crutchfield	
Sandra Edmonds	
Terry Hess	
Renard Young Jackson	
Debra Lewis	
Helenia Li	
Gene Mack	
Tracy Pouzar	
Ellen R Ramsey	
Desire Sanz	

Getting Ready For Conference

Please donate an item or two for the Auction

Remember: day two lunch you are on your own

- Sit down restaurants within walking distance
- Sportsmans Grille and The Whaling Company
- Menus will be provided at the conference
- Lots of fast food restaurants

Be part of Virginia Chapter's Ongoing Charity

Gift bags are made and distributed in December to one of New Hope's homeless shelters and a drug rehabilitation center. The more we collect, the more we can distribute.

- Collecting toiletries year round. Those items in your hotel room- TAKE THEM WITH YOU. Items needed are soaps, shower gels, lotions, shampoos, conditioners, small cosmetic bags, tooth paste, mouth wash, shaving cream, razors, lip gloss/lip stick, cotton balls, Q-tips, small bottles of perfume, large zip lock bags, tooth brushes, shoe cloths, combs/brushes, and other small items.
- If you are not attending the conference, please call any Board Member to make arrangements for delivering donated items.



Seminar Policies and Procedures

Course Update Policy

The following measures are taken by the Virginia Chapter/NATP to bring course content up-to-date on a regular basis and ensure that it remains technically accurate:

All speakers have designations which require them to pursue continuing education to remain in good standing in their fields and hold their present designation. They avail themselves of the latest law changes, etc. in their field of study. All speakers are required to submit course outline materials prior to the speaking engagement. The materials are reviewed by the Executive Director. The information is checked to make sure that any law changes, etc. have been incorporated into the presentation materials. The surveys completed by the conference attendees are reviewed by the Executive Committee after each conference.



Prerequisites for Classes:

Basic-No prerequisite required. Entry level or overview class.

Intermediate-Prior basic knowledge required with a prerequisite of prior educational class in the same field and/or prior knowledge of subject.

Advanced-Must have completed both an entry level and intermediate level class within the same subject topic, and have prior knowledge of topic.

Class Cancellation

Should one class during an educational program be cancelled, another will be substituted in its place if there is sufficient time to arrange such. If it is a last minute cancellation, then the individuals will have the option to take a different class being taught in the same time period.

If a 2-day conference has to be cancelled for unforeseen circumstances, it will be rescheduled at a later date/time.

Complaint Resolution:

Any written complaints will be put on the agenda of the next Board of Director's meeting. The complainant is advised that he has the right to come and address the Board with regard to his complaint. When a decision is reached, the complainant will be notified, in writing, of the outcome. Any changes or directives with regard to the outcome will be implemented. Please address complaints to:

Heidi Jo Steiniger, Executive Director
Virginia Chapter NATP
12730 Mill Road
Fredericksburg, VA 22407
(540) 785-7763
wintongirl@me.com

Record Retention Policy

Record Retention-the chapter will retain all records for a period of 5 years. This will include: course outline, list of course participants, dates and locations of presentations, names of instructors/discussion leaders, copies of course evaluations, amount of recommended CPE credit. All records of the organization are stored at the organization's address.

Are you interested in becoming a Member of the VA Chapter NATP Board of Directors?

Curious about the time commitment and duties.

- Three (3) year term: Jan-Dec.
- Serve on one of the various committees. (Time commitment dependent on committee.)(ex. Newsletter, Operating Policy, By-Laws, etc.)
- Four (4) Board meetings per year-three (3) via teleconference and one (1) at a location in VA to be determine.
- Attendance and Service at the annual state conference.
- Additional meetings and/or seminars as deemed necessary by the Board.

If you are interested in running, contact Megan Cohick-Eschemmann at megancohick@hotmail.com

Refund Policy

To cancel a reservation, you must notify VA/NATP in writing at least two-weeks in advance of the start of the conference. A \$30 administrative fee will be withheld from your refund.

How Are Credit Hours Reported to IRS?

After the completion of the seminar, certificates will be emailed to the attendees who request it. After the certificates have been emailed, the information is transmitted directly to IRS and counted toward each individual's compliance. If you have any questions, please contact the Executive Director via the contact information on the front page.

Continuation from our last newsletter

A HARD LESSON LEARNED-member submitted

I didn't do those things!!!! Praise the Lord.....I was not losing it. Close though. I had figured a "what if" scenario and did not mark it as such when I saved it in my files. In my hurry to get her the information she requested, I had pulled up the last saved return and just emailed it to her. Without looking at it. Bad decision. I emailed her the explanation and explained that IRS had the correct information so there were no corrections needed, that the correct return had been filed correctly. Thank goodness for that, but what about qualifying for their loan?

She finally calls me back, the bank had the correct returns from IRS after all, they were disqualifying her because her debt to income ratio was too high. Phew.... Did I learn a lesson, well actually 2.

First, make sure I label each copy I save correctly not thinking that I'll go back and do it later because I obviously did not, and

Second, to not let someone rush me because they are "desperate" and wait to the last minute and can't find their own records.

IT'S HARD TO SAY GOODBYE

Darrel D. Shinn, EA

When you leave a great place, a great organization, or fabulous friends, it is really hard to say goodbye. That is how I feel about leaving the Virginia Chapter of National Association of Tax Professionals. I was at the original organizational meeting in Charlottesville in 1991 when 17 of us met after receiving a call or card from Creola Loyd. She had attended a session at the National Conference in Las Vegas on how to form a Chapter and wanted to start one in Virginia. The Chapter needed only 50 NATP members to get started, and we were lucky to have over 300 NATP members in Virginia. Next came the task dividing the state into 5 regions, each with a minimum of 50 members to be represented by two Board members. After several years, we found the requirement of dividing the state into regions was of little value, so we abandoned that concept.

Paul Mehal was elected the first Chapter President and I was elected the first Vice President. When Paul was unable to complete his total term, I took his position for the remaining of his year and was elected President the second year of operation. The Board of Directors were totally responsible for setting up the annual Conferences including all the administrative work and teaching. Soon we were able to accumulate a core of instructors from the Chapter and therefore have not had to pay instructors for the past 25 years. I have been one of these instructors for 23 of those 25 years.

In 1994, I was elected to the National Board of Directors and spent 9 years with that body, but still attended almost all Chapter Board of Directors meetings, keeping them apprised of what was happening at the National Level. In 2004, I ended my term on the National Board and was again elected to the Virginia Board where I became Treasurer. After 9 years, I again left the Board, but was appointed a one-year term last year which will end on December 31st.

I am so proud of the awards this chapter has won over the past 25 years (only 2 of 25 did the Chapter not win something in the Chapter of the Year awards or Chapter Person of the Year) and that our membership is nearing 700+. With records like this, there is little wonder that this Chapter is in the top 3-4 Chapters in NATP.

So, you can see why I have a very fond place in my heart for the Virginia Chapter and all the great members who attend our conferences and go to National conferences also. I am almost at a loss for words when I announce that Sue and I will be moving to Florida after the November Conference and I will no longer be a member nor be attending the education programs of the BEST CHAPTER IN NATP!!!!



Tax Joke from J. Paul Getty

"If you get up early, work late,
and pay your taxes, you will get
ahead—if you strike oil."

Clients Hassle Due To A Fraudulent Return

Vernon W. Graber, EA

The dilemma started when a client of mine, I will name Mr. & Mrs. Unfortunate, received a check dated March 18, 2015 from the Internal Revenue Service, made out to Mrs. Unfortunate, in the amount of \$2,234.00. It was shown thereon that it was her refund for the calendar year 2014. Mrs. Unfortunate called the IRS and was told that she had filed a return as a single individual and that was her refund. She explained that no 2014 return had yet been filed but that she had recently given the information for their 2014 return to their accountant who prepares the return for them, and that she had not received any notice from him that their 2014 returns were ready to be submitted, nor had they signed any forms authorizing him to e-file the return.

She requested a transcript of the information on the return that had been fraudulently filed by someone else using her name and social security number. Upon receiving that, she promptly turned that information over to me. The transcript showed a single person had filed a return with one W-2 as the only income. In previous years, Mr. & Mrs. Unfortunate had filed a joint return and they were planning on filing a joint return again in 2014.

Upon not receiving any satisfaction about this refund, she called me and I told her that their 2014 return had not yet been completed and I advised her not to cash or deposit the check as the IRS will eventually want it to be returned to them. At that point, I sent a letter dated May 27, 2015 to the IRS accompanied by two forms 2848 authorizing me to represent them regarding the 2014 return. I know I could not electronically file their 2014 return since someone had already filed a return using her social security number; however, I was glad that the refund went to Mrs. Unfortunate and not to the scammer. In the meantime, on May 5, 2015, the Unfortunates mailed in their completed 2014 return.

A copy of that return was sent included with the other information and letter (I used my name and address as the sender) that was sent to the IRS on May 27, 2015. On June 23, 2015, I sent a second copy of the May 27th letter, since as of that date no one had received a response to the letter. Their 2014 return, which I prepared for them, reflected a refund due the Unfortunates of \$903.00. In July, the Unfortunates received a letter stating that the IRS would within six weeks look into this situation and get back in touch with them. Near the end of the six weeks, the Unfortunates received yet another letter stating that they would get back in touch with them within 45 days.

On September 15, 2015, at 7:00 p.m., I, the preparer, received a phone call from the IRS. They requested the return of the original check of \$2,233.00 and stated they would complete the processing of Unfortunates' 2014 return and issue them the \$903.00 refund as shown on their joint return. I called Mrs. Unfortunate and gave her the address as to where to return the check and she stated she would return it immediately. This case remains in process until this refund is received, and I will give you an update as soon as one is available.



2015 Virginia NATP Conference Agenda

Day One—November 5, 2015

7:15a Registration (Continental
Breakfast items provided)

8:00a Welcome

8:30a IRS Updates -Ley Mills

10:10a Break

10:20a Affordable Care Act for the
Practitioner - Frank Rooney

12:00p Lunch

1:00p VA Updates - VA Department of
Taxation-Jeremy Armstrong

1:50p Ethics - Frank Rooney

3:30p Break

3:50p Retirement Planning - Gail
Fialkow

5:45p Hospitality Suite and Annual
Auction

Day Two—November 6, 2015

7:15a Registration

7:30a General Meeting
Voting for 2016 Board Members

8:15a Breakout Session I
ACA Law - Frank Rooney
Passive Activities - Delmar Gillette
Border States - Melinda Wiedenhoeft

10:10a Breakout Session II
ACA Law - Frank Rooney
Choice of Entity- Vernon Graber & Pat
Faulk
Border States- Melinda Wiedenhoeft

11:50a Lunch (On your own)

1:50p Breakout Session III
Annual Refresher - Teresa Steiniger
Passive Activities - Delmar Gillette
Paperless Office - Darrel & Donn Shinn

3:40p Breakout Session IV
NOL - Donnie Kerns
Choice of Entity - Vernon Graber & Pat
Faulk
Paperless Office - Darrel & Donn Shinn

5:20p End of Day Two

2015 Charity

New Hope Housing is an innovative nonprofit agency in Northern Virginia providing shelter, transitional and permanent supportive housing, and support services for homeless families and single adults. They are committed to finding creative and lasting solutions to end the cycle of homelessness by offering homeless men, women and children the services they need to change their lives and succeed. And each individual success story contributes to a stronger, healthier community for all.

Their mission – to provide homeless families and individuals shelter, housing, and the tools to build a better life.

Their vision – a home and bright future for every man, woman and child in our community.

Their Results

New Hope Housing served 1,567 individuals – including more than 300 children – in one or more of their programs in FY 2015. They helped 53 families move from shelter to permanent housing in the community, and 8 families move to transitional housing; 199 single adults were helped to move to permanent housing. Education and employment staff helped hundreds of residents attain new employment and many more participated in personal money management classes. On any given night, more than 300 people find a safe place to sleep in a New Hope Housing operated home or facility.

Annual Filing Season Program (AFSP)

Did you know...Starting with the 2016 filing season, tax preparers without professional credentials and/or an AFSP - Record of Completion will NOT be able to represent clients before the IRS for any returns prepared and signed after December 31, 2015.

Did You Know...

The Affordable Care Act is the granddaddy of tax law changes this year.

Bitcoin currency should be included in your annual income at fair market value.

If you provide non-skilled medical support services or care for a person, living in your home, who has physical, mental or emotional issues, AND you receive payment from the state or certified Medicaid provider, those payments can likely be excluded from your taxable income, even if the person is related to you.

In 2015, you can ONLY make one rollover from an IRA to another IRA in a 12-month period. This means you can withdraw funds from one IRA, holding them for less than 60 days and then depositing them into another IRA account.

MEMBER ALERT

Virginia NATP needs your talents. Our survival depends on you! Please consider the following opportunities:

- Become a Board Member (contact Chapter President for details)
- Write articles for the Chapter Newsletters
- Assist with Special Functions- planning for the conference Auction, and/or National's Chapter on Parade
- Membership Committee- recruiting new members by emailing, telephoning, speaking at universities or other organizations
- Education Committee- selecting courses, locating instructors, working with the National Chapter, coordinating other VA seminars for IRS Registration.
- Researching hotels for upcoming State Conferences
- Contacting vendors for our yearly conference

Continuing Education Requirement for 2016 Filing Season	
Non Exempt - 18 Hours	Exempt - 15 Hours
6 hours AFTR Course & Test	3 hours Federal Tax Law Updates
10 hours Federal Tax Law Topics	10 hours Federal Tax Law Topics
2 hours Ethics	2 hours Ethics

Virginia



National Association
of Tax Professionals

12730 Mill Rd., Fredericksburg, VA 22407

Pre-Sort
Standard
US Postage Paid
Fredericksburg, Virginia
Permit No. 159

Recipient Name
Company Name
Address
City, State Zip Code

