



# NAEA

## NATIONAL CONFERENCE LAS VEGAS 2017

**July 31 – August 3**  
**The Cosmopolitan of Las Vegas**

# CONFERENCE GUIDE

### CANOPY PRE-CONFERENCE SESSION

*Sunday, July 30, 4:30 PM – 5:30 PM, Gracia 3*

Hit the ground running and earn CE before the conference! Canopy is pleased to host a pre-conference presentation, “How to Report Clergy Earnings,” with instructor Tanya Baber, EA. Pre-registration is required in order to earn 1 Federal Tax CE.

### TRAIN, HIRE AND MENTOR: THE NEXT GENERATION OF EAS

*Monday, July 31, 11:50 PM – 12:50 PM, Gracia 3*

Enjoy a free lunch offered by Educating America and Gleim. This seminar showcases the great benefits of establishing the Educating America program in your office/ chapter/state. The presentation is geared toward those members who have never heard of the Educating America program or those who want more information on the program. Seating is limited. Sign up today!

### WELCOME RECEPTION AND OPENING PLENARY

*Monday, July 31, 4:40 PM – 7:00 PM*

*Gracia 1/2 & Condesa 3,4*

Kick off the National Conference by networking with colleagues, instructors, exhibitors, NAEA leadership, and staff at the Welcome Reception sponsored by Paychex. Then attend the Opening Plenary with special guest U.S. Tax Court Judge Mark Holmes, where he will discuss his observations on the function of the Tax Court, the role representatives play in effective tax administration, and the importance of tax professionals.

### BREAKFAST WITH JUDGE HOLMES, SUPPORTING THE NAEA EF

*Tuesday, August 1, 7:00 AM – 7:50 AM, Gracia 3*

Each year the NAEA Education Foundation supports current and aspiring enrolled agents by helping to exceed professional standards and grow their tax expertise, all made possible by contributions from members like you. Enjoy this fundraising breakfast with special guest U.S. Tax Court Judge Mark Holmes. This event requires pre-registration and a donation to the NAEA Education Foundation.

### LUNCH & LEARN: MAKING THE TRANSITION FROM PREPARATION TO REPRESENTATION

*Tuesday, August 1, 11:50 PM – 12:50 PM, Gracia 3*

Ready to further your tax practice? Enjoy a hot plated lunch while Kevin Huston, EA, USTCP, presents on making the lucrative transition from prep to rep. This event, for 1 NAEA CE, requires pre-registration and a fee.

### NAEA ANNUAL MEETING

*Tuesday, August 1, 5:15 PM – 7:00 PM, Condesa 3,4*

Participate in NAEA’s governance, strategic direction, and future priorities.

### 2017 NAEA PAC CLUB LEVEL RECEPTION

*Tuesday, July 31, 7:00 PM – 8:00 PM, Gracia 3*

*(For NAEA PAC Club Level members only)*

To attend, please stop by the NAEA PAC table and pick up your complimentary pass. If you are not a Club Level contributor yet, please drop by the table and speak with one of our NAEA PAC reps about making your Club Level contribution. Attendees will enjoy hors d’oeuvres, an open bar, a short inside-the-beltway briefing, and door prizes.

### NEW MEMBER BREAKFAST

*Wednesday, August 2, 7 AM – 8 AM, Gracia 3*

Be sure not to miss the New Member/First Timers Breakfast on Wednesday. Come and meet NAEA leadership and learn about the value of an NAEA membership.

### NTPI GRADUATION AND NAEA NATIONAL AWARDS PRESENTATION

*Wednesday, August 2, 5:30 PM – 7:00 PM, Condesa 3/4*

Join us for the graduation ceremony and a brief reception honoring the newest class of NTPI Fellows®. These dedicated professionals have completed the three levels of the National Tax Practice Institute™. NAEA will also recognize exceptional members who have demonstrated leadership and vision.

### NAEA BOARD MEETING,

*Thursday, August 3, starting at 8:30 AM, Castellana*

## SPECIAL EVENTS

Day	Event	Room	Floor	Time
<b>SUNDAY</b>	Canopy Pre-Conference Session*	Gracia 3	3	4:30 PM – 5:30 PM
<b>MONDAY</b>	Train, Hire and Mentor: The Next Generation of EAs*	Gracia 3	3	11:50 AM – 12:50 PM
	Welcome Reception	Gracia 1,2	3	4:40 PM – 6:00 PM
	Opening Plenary	Condesa 3,4	2	6:00 PM – 7:00 PM
<b>TUESDAY</b>	Breakfast with Judge Holmes Supporting the NAEA EF*	Gracia 3	3	7:00 AM – 7:50 AM
	Lunch & Learn: Transitioning From Prep to Rep*	Gracia 3	3	11:50 AM – 12:50 PM
	NAEA Annual Meeting	Condesa 3,4	2	5:15 PM – 7:00 PM
	NAEA PAC Reception*	Gracia 3	3	7:00 PM – 8:00 PM
<b>WEDNESDAY</b>	New Member Breakfast	Gracia 3	3	7:00 AM – 8:00 AM
	NTPI Graduation and NAEA Awards	Condesa 3,4	3	5:30 PM – 7:00 PM.
<b>THURSDAY</b>	NAEA Board Meeting	Castellana	3	Starting at 8:30 AM
	Education Foundation Meeting	Castellana	3	Following Board Meeting

\*Registration and other requirements apply

## CLASS SCHEDULE

Classes will be held daily from 8 AM. to 4:40 PM with the following opportunities for refreshments in the exhibit hall, Gracia: Breakfast, 7:00 AM – 8 AM morning and afternoon breaks, 9:40 AM – 10:00 AM and 2:40 PM – 3:00 PM  
Classes will break for lunch on your own daily from 11:40 AM – 1:00 PM

### The Cosmopolitan of Las Vegas (3<sup>rd</sup> Floor)



MONDAY  
JULY 31

#### NTPI LEVEL 1 Brera 1 & 2

**Overview of Representation**  
Kevin C. Huston, EA, USTCP

**Introduction to Collections**  
Marc Dombrowski, EA

**Transcripts and CSED Extenders**  
Clarice Landreth, EA

#### NTPI LEVEL 2 Gracia 1 & 2

**Representation Terminology**  
Alan Pinck, EA

**Preparing for an Audit**  
Aaron Blau, EA, CPA

**Form 1040 Audits**  
Alan Pinck, EA

**FOIA**  
Salvatore P. Candela, EA

#### NTPI LEVEL 3 Castellana 1

**Advanced Criminal Tax Issues**  
Robert E. McKenzie, EA, JD

**Advanced Appeals**  
Salvatore P. Candela, EA

**Bankruptcy**  
Robert E. McKenzie, EA, JD

#### GRADUATE LEVEL IN REPRESENTATION Brera 5 & 6

**Current IRS Enforcement Priorities**  
Steven Walker, JD

**Advanced Federal Tax Liens**  
Robert E. McKenzie, EA, JD

**Tax Research for the Representative**  
Kevin Huston, EA, USTCP &  
Thomas Gorczynski, EA, USTCP

#### TAX PREPARATION ISSUES Castellana 1

**Preparing Form 1040**  
Frank Degen, EA, USTCP

**Death and Taxes**  
John R. Dundon II, EA

**International Information Returns for the US Taxpayer**  
Steven Walker, JD

**Real Estate Professionals**  
John R. Dundon II, EA

TUESDAY  
AUGUST 1

**Introduction to Examination**  
Alan Pinck, EA

**Tax Research and Resources**  
Thomas A. Gorczynski, EA, USTCP

**Non-Filers**  
Claudia A. Hill, EA

**Innocent Spouse**  
Claudia A. Hill, EA

**Enforced Collections**  
Aaron B. Whitaker Jr, EA

**Collection 433 A-F**  
Marc Dombrowski, EA

**Collection Representation**  
Marc Dombrowski, EA

**SFR and Audit Reconsideration**  
Catherine A. Clow, EA

**Advanced Examinations**  
Claudia A. Hill, EA

**Advanced Trust Fund Recovery**  
Steven Walker, JD

**Statute of Limitations**  
Frank Degen, EA, USTCP

**Community Property and Collections**  
LG Brooks, EA

**Rules and Doctrines in Tax Court**  
Frank Degen, EA, USTCP

**Advanced Ethical Issues in Representation**  
Claudia A. Hill, EA

**I Have a Client Who...**  
Clarice Landreth, EA & Alan Pinck, EA

**Ethics for the Tax Preparer**  
John R. Dundon II, EA

**280-E Marijuana Tax Prep Issues**  
John Sheeley, EA

**The Shared Economy**  
Lisa Ihm, EA

WEDNESDAY  
AUGUST 2

**Communicating with IRS**  
LG Brooks, EA

**Introduction to Appeals**  
Jo-Ann Weiner, EA

**IRS Notices**  
LG Brooks, EA

**Introduction to Criminal Investigations**  
LG Brooks, EA

**Ethics for the Tax Practitioner**  
Aaron Blau, EA, CPA

**Examination Appeals**  
Bert Hartmann, EA

**Ethics**  
Amy King, EA

**Collection Appeals**  
Aaron B. Whitaker Jr, EA

**Representation Wrap Up**  
Aaron B. Whitaker Jr, EA

**Preparing Form 656 and 433-A OIC**  
Aaron B. Whitaker Jr, EA

**Representation Ethics**  
Sherrill Trovato, EA, USTCP

**Correcting Bad Actions of Clients**  
LG Brooks, EA

**Tax Court Jurisdiction**  
Sherrill Trovato, EA, USTCP

**LLC Collections**  
Clarice Landreth, EA

**Identity Theft**  
Jo-Ann Weiner, EA

**Foreign Workers**  
John Sheeley, EA

**Repair Regulations**  
Lisa Ihm, EA

**Hot Topics**  
John Sheeley, EA

**Alternative Minimum Tax**  
Lisa Ihm, EA

\* Please see course schedule for exact course timing.