

## A Message from the President

We have moved our Spring Fling/ Annual Meeting to June 28 – July 1.

This has been a very trying season for us Tax Professionals. I don't know if we will ever see "normal" anytime soon, but one thing is for sure, we will need all the education as well as the need for our connections with our fellow NATP members that we have made.

I look forward to being able to connect with the very people who understand the crazy and chaotic world in which we have been working. I hope to see you all there for some wonderful education, with Ms. Kathryn Keane and our networking opportunities. Please do not forget our famous Stone-Lewis Scholarship Auction with Ms. Nelda Bunch as our Auctioneer. Start thinking of items to bring; as well as saving some money to buy those special items that catches your eye.

Once again for our 2020 Charity, I have chosen the Baldwin County Boys Ranch. Please start gathering hygienic products, paper products and cleaning supplies. If you would like to see more of what the Ranch does for these young men, please visit <https://boysandgirlsranches.org/baldwin>. You can also check out their U-tube video: <https://youtu.be/XTyKJapsG3E>.

We will continue to work diligently to keep all of you informed of any new changes. If you have any questions or concerns, please feel free to contact myself or any Board Member. I would like to thank our hard-working Board of Directors and our Membership for your continued support of our Alabama NATP Chapter!



Sheila M Sutton, EA  
AL NATP Chapter President

## Board of Directors

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256-586-2366

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205-518-8850

Secretary: Amanda Elrod  
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Treasurer: Pam Worsham Co-Chair  
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251-

## In this issue:

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- Education News
- Welcome new members
- Anniversaries
- Member Brags
- Upcoming Events



**January**

- Debbie K Bass (R)
- Tanisha DeLaGarza (R)
- Joel King
- Maureen Patricia Vaughn

**February**

- Jerry J Kokemor
- Andrette Munnerly

**March**

- Yolanda Austin
- Bardette Jack
- Jena Large (R)
- Jim L Lowery
- Deborah S Miles
- Jean Persons
- John Eric Wilson
- Renee Lynetter Wise



**5 Years**

- Amanda Elrod
- Daniel Smith
- Ed Foy
- Robert A Tufts
- Sherry Nelson
- Tanisha DeLaGarza
- Theresa Davis Henderson
- Timothy A Hall
- Tony Wayne Elrod
- Victoria Kokemor

**10 Years**

- Andrew Louis Graffeo
- Anna Troxell
- Carrie Elaine Fifarek
- Debbie Pope
- Deidree D Jones
- Edgar Castro
- Eva Heifner-Hobson
- Gwendolyn Harris Brooks
- Helen Louise Hertz
- Pamela E Worsham
- Victor Olukayode Koriko

**15 Years**

- Adele Anderson
- Bard C Powell
- Charles O Jones
- Jane E Johnson
- Rhonda Bailey

**20 Years**

- Kim Reid
- Margaret F Davis
- Thomas E Hunter Jr
- Timothy R Rude

**25 Years**

- Beauford Monroe Young
- C Reed Terry

**35 Years**

- William C Madison

**Education News!**

As we continue to work during this extended season, try not to stress over things you cannot control. *“This too shall pass!!!”*

Our annual Spring Fling is just around the corner, so if you have not already registered, please to do so immediately. Early bird pricing ends on June 12, 2020. We will have in place CDC seating arrangements if required and mask available should the need still be there for virus containment. Hampton Inn & Suite group reservations under the code: **“NAT”** group pricing begins 06/26/2020 through 07/04/2020. Should you encounter any problems making your reservations, please call the hotel direct at 251-923-4400 and ask for Allison or Melanie or copy and paste this online link: <http://hamptoninn.hilton.com/en/hp/groups/personalized/M/MOBOBH-X-NAT-20200626/index.jhtml>

The Seminar at Sea is currently still on go... Register for your cruise now while pricing is lower than ever. Call David Diamond at 302-444-8447 or 484-483-3272. Currently pricing is at its lowest with extra on-board credits. All staterooms must be booked through Mr. David or his staff to participate in all Chapter events on board the ship. Education registration is still handled via our Alabama Chapter Website on NATPtax.com.

All education information for the Alabama Chapter of NATP can be accessed via this link:

<https://www.natptax.com/Chapters/Pages/AlabamaChapter.aspx>

Mark your calendars for our annual AFTR testing class for Thursday, December 3, 2020. We will be returning to Paul Young’s offices at AFM Inc., Hoover, AL Class will begin at 8:30 am; followed by testing if you so desire to test at that time.

Last, but most definitely not the least.... **UPDATE CLASSES! December 4, 2020 we plan to host Federal and Alabama State update classes as well as a “Lunch and Learn Luncheon”, we hope to offer 4-5 hours CPE. Watch your email and Chapter News communications for further information as the planning continues for these classes. (Note: we hope to offer a discount for those that attend both days – AFTR & Updates)**



Kathy R Hallford, EA  
Co-Education Chair





### Telephone Directory

Practitioner Priority Service  
Individuals  
866.860.4259

Business  
800.829.4933

National Taxpayer Advocate  
877.777.4778

Alabama Taxpayer Advocate  
334.242.1055

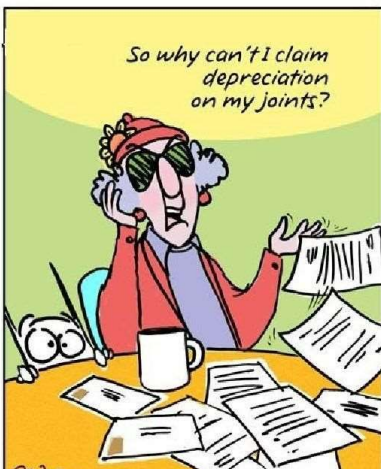
EFTPS  
800.555.3453

IRS Refund Hotline  
800.829.1040

Alabama Department of  
Revenue  
334.242.1170



### A Little Humor



In June we will hold our Annual Board of Directors Elections. If you are interested or know of someone who is interested please send Carol Bates or Kathy Hallford an email (email and phone numbers on front page). If you do not want to be on the Board of Directors, but are willing to volunteer... we could still use your help. I know time is precious, but we could use your input into helping this organization grow. Let any of the Board of Directors know if you are interested in volunteering to help your organization.

## 2020 Spring Fling Educator Bios



### Kathryn M. Keane, EA

Kathryn is the principal tax professional at Macánta Corporation, a small family owned tax and related services practice located in Brooklyn, NY, serving over 975 individual clients and 70 businesses. Kathryn served two 3-year terms on the National Board of Directors of NATP. Kathryn is the only person in the history of NATP to be awarded Chapter Person of the Year three times. In 2002, 2008 and in 2015 recognizing her volunteer service to the community at large as well as to NATP. In addition to serving on the Board of the NY Chapter of NATP, she currently serves as Chair of the IRS Triboro Practitioner Liaison Committee. Kathryn presents for NATP as part of its 1040 Update series, at their National Annual Conference and for NATP Chapters across the country. Kathryn, an NTPI Fellow, has a B.S. degree from Brooklyn College and is an authorized IRS Enrolled Agent.



### Kathy R. Hallford, EA

Kathy is a graduate of Draughon's School of Business with a Certificate in Career Accounting. Kathy became an Enrolled Agent March 2007. She has served on the AL NATP Board of Directors since 2010, and has been the Chapter Secretary, Chapter President, and currently serves as an Education Co-Chairman. Kathy has been a tax practitioner since 1995 and owns Kathy's Tax Service, LLC in Gilberttown, AL, offering tax preparation, full service bookkeeping and payroll services, specializing in ministerial returns and the small business field of taxation. Kathy regularly attends continuing education provided by NATP, Enrolled Agents Society, Auburn University and the IRS. She grew up in a minister's home and has the privilege of providing a large number of ministers across the US tax services. She enjoys coordinating events, volunteering, working with others and traveling. Kathy lives in Gilberttown, AL with her husband Larry, and they have two sons.



## WEBINAR

### LIVE EDUCATION:

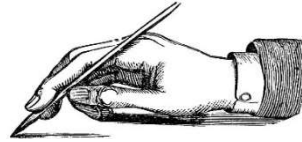
#### NEW DATES

2020 Spring Fling Education & Annual Membership Meeting Conference  
June 28 – July 1, 2020  
Orange Beach, AL

NATP National Conference  
July 27-30, 2020  
San Antonio, TX



## Notes from the Editor



Hello! Thank you for taking the time to read the AL NATP **Bama News**. Will this season ever end? I don't know, but I do know that we would like to hear from you. Please submit any articles you would like to share with your fellow NATP Members.

Sheila M Sutton  
[sheila@protaxarab.com](mailto:sheila@protaxarab.com)



## Member Brags

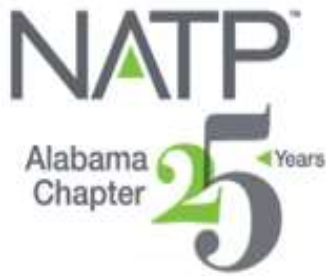
### Mardi Gras In Mobile!

NATP members Jessica Allen, President and Carol Bates, Treasurer are founding board members of the Saraland Mardi Gras Association, Krewe of Sparta. This year, the Krewe of Sparta changed things up and went with the Roaring 20s theme since their ball was held on 2/22/2020.

Mardi Gras is celebrated all over the Mobile area and Saraland is no exception. This year, the Grand Marshall for the parade was Alabama's own Eli Gold. Eli rode in the parade and later that night attended the ball at the Temple Downtown. The parade also included a fly-over by the US Coast Guard, the Wienermobile, Big Al and numerous floats to include full-sized Mardi Gras floats.

Membership will re-open after we are all allowed to gather in public again. We are hoping for an even better year for our Krewe. More photos and information can be found at [www.smgalife.com](http://www.smgalife.com)





**Hampton Inn & Suites**  
 25518 Peridido Beach Blvd.  
 Orange Beach, AL 35561  
 Direct: 251-923-4400  
 Group Code: **NAT**  
 Group Discounts Apply:  
 June 28 – July 1, 2020

2020 Spring Fling Education & Annual Membership Seminar  
June 28 – July 1, 2020

**SUNDAY, JUNE 28, 2020**  
**Kathryn Keane, EA Instructor**

<b>12:30pm to 12:50pm</b>	Early Registration & Materials Pickup	
12:50pm to 1:00pm	Greeting and Housekeeping	
1:00pm to 2:40pm	<b>Cannabis</b>	<b>2 hrs CPE</b>
2:40pm to 2:55pm	Break	
3:00pm to 4:40pm	<b>Nuts &amp; Bolts of Gift Tax: A Primer</b>	<b>2 hrs CPE</b>
4:40pm to 4:55pm	Break	
5:00pm to 6:40pm	<b>Sunset Ethics Class: Implementing Best Practices in your Tax Office</b>	<b>2 hrs Ethics</b>
7:00pm until --	Board of Directors Meeting Sheila Sutton, EA, President	

**MONDAY, JUNE 29, 2020**

7:45 am to 8:00 am	Registration & Materials Pickup	
8:00 am to 8:10 am	Greetings and Housekeeping	
8:10am to 11:40am	<b>What happens when client dies?</b>	<b>4 hrs CPE</b>
11:50am to 2:10pm	<b>Luncheon with Round Table Discussions</b>	<b>2 hrs. CPE Federal</b>
2:10pm to 2:30pm	Break	
2:30 pm to 4:00pm	<b>Annual Membership Meeting &amp; Installation of Officers &amp; greetings from National Representative</b>	
4:15pm to 5:15pm	<b>Meet n Greet by the Sea</b>	
6:30pm	Networking-Dinner (Dutch) at Tacky Jacks, Orange Beach <i>(Subject to cancellation due to Covid-19)</i>	

**TUESDAY, JUNE 30, 2020**

8:00 am to 8:10am	Greetings and Housekeeping	
8:10am to 11:50am	<b>Form 3115: Inside &amp; Out</b>	<b>4 hrs CPE</b>
11:50am to noon	Break & Luncheon Set-up	
<b>Noon until</b>	<b>Stone-Lewis Scholarship Banquet &amp; Charity Auction</b>	

**WEDNESDAY, JULY 1, 2020**

8:00 am to 8:10 am	Greetings and Housekeeping	
8:10am to 11:50am	<b>Advanced Farm Preparation</b>	<b>4 hrs. CPE Federal</b>
11:50 am to Noon	Closing & Door Prizes	

Baldwin County Sherriff's Ranch for Boys – Charity

Total CPE Available: 16 CPE Federal Taxation hours - 2 CPE hours Ethics; total CPE hours available 18 CPE hours



**NATP Alabama Chapter  
 2020 Spring Fling Conference & Annual  
 Membership Meeting**

June 28-July 1, 2020

**Hampton Inn & Suites**  
 25518 Perdido Beach Blvd  
 Orange Beach, AL 36561  
 251-923-4400

Name: \_\_\_\_\_ Customer ID#: \_\_\_\_\_

Designation(s): \_\_\_\_\_ License #: \_\_\_\_\_ PTIN #: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Email: \_\_\_\_\_ Phone: \_\_\_\_\_

Emergency Contact Name & Phone Number \_\_\_\_\_

Check here if the above address should be your main mailing address.

Registration Fee	NATP Member	Non-Member	Paper Materials	Guest Meal Ticket
	\$250	\$280	\$35	\$40
<b>After 6-12-20</b>	\$285	\$315		

**Will Attend the Following:**

Meet N Greet by the Sea June 29, 5:00 – 6:00 p.m. <b>Yes      No</b>	Dutch Dinner at Tacky Jacks June 29, 6:30 p.m. <b>Yes      No</b>	Stone-Lewis Scholarship Banquet & Auction June 30, 12:00 p.m. <b>Yes      No</b>
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**Note:** Registration includes e-materials and meals provided by the Chapter.

Registrations must be received at NATP by close of business Friday, June 12, 2020  
 After that date, please register at the door.

Payment Method: Credit Card or Checks made payable to NATP

Name as it appears on CC: \_\_\_\_\_

CC #: \_\_\_\_\_ Exp. Date: \_\_\_\_\_ CVV # \_\_\_\_\_

Signature: \_\_\_\_\_

**How To Register:**

**Mail To:** NATP, PO Box 8002 Appleton, WI 54912-8002

**Phone:** 800.558.3402, Ext. 3

**Fax:** 800.747.0001

**Online:** <https://www.natptax.com/Chapters/Pages/AlabamaChapterEducation.aspx>

**Cancellation Policy:** Cancellations must be submitted to NATP by June 12, 2020 to receive a refund.  
 Cancellation is subject to a \$50 fee.