

A Message from the Education Committee and President

2020 has been a year to beat any other year in my memory of being in the tax profession. Now that the “final” extended season is over, we hope you are seeing daylight and getting to relax from the overwhelming season we have had.

We have approval for our 2020 Federal and AL State Update Class, on December 4, 2020, at American Financial Management, 2131 Data Office Dr #250, Birmingham, AL 35244.

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

Ms. Nora Huffman and Mr. Blake Madison will be our instructors. Please see their bios and course descriptions later in this newsletter.

We will also be offering the AFSP Study Course on December 5, 2020, in Birmingham, AL.

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

Ms. Jessica Allen, EA, will be the primary instructor for this class, with Sheila Sutton, EA and Kathy Hallford, EA assisting. Bios and course descriptions on page 4.

We do not have a set hotel in mind for this event. There are several places within 5 miles of American Financial Management. You need to reserve your own hotel room (Hampton Inn and Suites, 4520 Galleria Blvd, Hoover, 205-380-3300; Holiday Inn, 2901 John Hopkins Pkwy, Hoover, 205-682-2901; Embassy Suites, 2960 John Hopkins Pkwy, Hoover, 205-985-9994 are just a few.) If you should have questions please call Brandon Jones, Amanda Elrod, or Sheila Sutton.

Our Seminar at Sea, has been postponed to November 8, 2021. Those of you who have booked the cruise, or still want to, should contact David Diamond at 302-444-8447 or 484-483-3272 for information regarding how to do so for next year. Registration for the Seminar is not available yet, but please watch for upcoming news.

We hope every one stays safe and healthy, and we look forward to seeing you all in December.

AL NATP Education Committee

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Instructors, December 4, 2020 and Course Descriptions



Nora Huffman, IRS Liaison

BIO: Nora began her career with the Internal Revenue Service in 1992 as a Clerk in the Examination Support and Processing Division. In 1994, she became a Revenue Agent where she had the opportunity to examine a variety of business and personal income tax returns. Recently, Nora joined the Communication, Liaison and Disclosure Division as Stakeholder Liaison. Nora has a Bachelor of Business Administration Degree in Management from the University of Montevallo, and a Master's Degree in Public Administration from the University of Alabama in Birmingham.

COURSE DESCRIPTION: Generally, the legislation aims to expand and strengthen taxpayer rights and to reform the IRS into a more taxpayer-friendly agency by requiring it to develop a comprehensive customer service strategy, modernize its technology and enhance its cyber security. After this presentation, attendees will understand how the IRS is working on restructuring the organization to improve taxpayer experience and modernize operations.

According to The Bureau of Labor Statistics, over 23 million U.S. workers have filed for unemployment this year nationwide. Taxable benefits include any of the special unemployment compensation authorized under the Coronavirus Aid, Relief, and Economic Security (CARES) Act, enacted this spring. Attendees of this session will receive guidance, tax tips and tools to assist taxpayers with reporting this income.

Tax Law Updates: This section provides highlights of changes for next year's filing season. After this section attendees will have raised awareness of upcoming tax changes and tax forms changes for 2020.

December 4, 2020 Instructor and Bio

Blake Madison, Esquire



Mr. Blake Madison is an attorney and a shareholder in the law firm of Rosen Harwood, P.A. where he practices primarily in business, corporate and commercial law; state and local taxation; non-profit entities; and health care law.

He has participated in reported tax cases before the Alabama Supreme Court; the Alabama Court of Civil Appeals; and the Alabama Department of Revenue's Administrative Law Division. He was honored with the 2012 Charles H Land Member of the Year Award by the Chamber of Commerce of West Alabama, its highest award given to an individual.

COURSE DESCRIPTION: This session will update you on recent legislative and case law developments in the challenging world of Alabama and federal taxes. Common current compliance issues and opportunities for tax savings will also be addressed in this fast-paced discussion. We will also discuss recent legislation and case law that impact businesses and their operations in Alabama.

Finally, we will identify potential state and federal tax legislation on the near horizon and possible related issues.

Objectives: Attendees should be able to:

- Learn recent tax law developments on the state and federal level that could impact their business and individual clients.
- Develop awareness of recent business law changes that could have repercussions to their business clients.

Study Session for AFSP Certification

We will be offering the **Study Session for the AFSP Certification** again this year. We will be piggy backing on AL NATP Federal and State Tax Updates, December 5, 2020. Messer's Bo and Paul Young are generously allowing us to use their classroom again this year and they are conveniently located in the center of Hoover at 2131 Data Office Drive, Hoover, AL. Registration is now open on our National AL Webpage at:

<https://www.natptax.com/Chapters/Documents/2020AL-StudySessionforAFSPCertification120520-regform.pdf>

Be sure to register for National's free Self-Study program so when you get to class you will be prepared for a review of the course and test that afternoon. Testing at this class is not required but we have had 90%+ passing scores for those testing immediately following the study session. (Notes: no "group" hotel – choice is up to you) Lunch and snacks are included with the registration fee.

Instructors



Jessica Allen is an Enrolled Agent from Saraland AL. She has worked in her family owned business since 2005. She specializes in partnership returns, Sch D, S Corps and Sch F.

Jessica is married and has 3 children. She is also very active within her community. She is president and was the first queen of the Saraland Mardi Gras Association. Jessica serves as the third year trustee and patriotic instructor of the Auxiliary of the Saraland VFW and is a long time member of the Order of the Eastern Star.



Kathy Hallford, EA

Kathy graduated from Draughon's School of Business; has been a tax professional since 1995; opening Kathy's Tax Service in 2001; providing individual and corporate tax preparation, bookkeeping and payroll services.

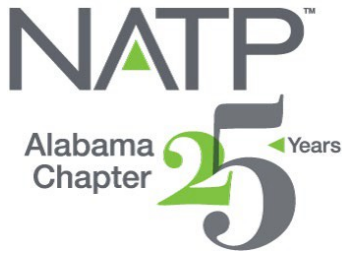
She became an IRS Enrolled Agent in 2007 and has served on the AL Chapter NATP BOD, serving as President, Vice-President, Secretary, Treasurer, Newsletter and Education Chairperson and is a NATP Certified Instructor. She enjoys teaching and coordinating tax education events.



Sheila Sutton, EA

Sheila is a graduate of Southern Illinois University Edwardsville; she has been a tax professional since 2004 after leaving her career as a college instructor. She worked with Professional Tax and Accounting and eventually bought the business in 2008 providing individual and corporate tax returns, specializing in small businesses and farms, as wells as payroll services;

She became an Enrolled agent in 2012. She is currently serving as the 2020 AL NATP Chapter President.



**2020 FEDERAL AND
STATE UPDATES**

American Financial
Management 205-438-7359
2131 Data Drive Suite 250
Birmingham AL 35244

ALABAMA

December 4 - 5, 2020

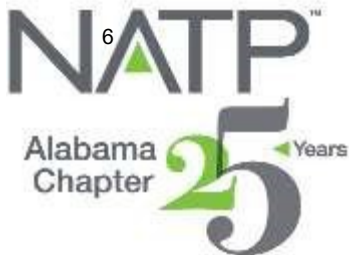
FRIDAY, DECEMBER 4, 2020

7:45am - 8:25am	Registration		
8:25 am to 8:30am	Greeting and Housekeeping		
8:30 am to 11:30am	Taxpayer First Act of 2019 Federal Tax Updates	Nora Huffman, IRS	3 Hrs. CPE
	(Break at Instructor's Discretion)		
11:40am to 12:50pm	Roundtable Luncheon	Sheila Sutton, EA, President Brandon Jones, VP, Education Chair Amanda Elrod, Education Co-Chair	1 Hr. CPE
1:00pm to 4:30pm	2020 Alabama State and Federal Updates	Blake Madison, ESQ	3 Hrs. CPE
	(Break at Instructor's Discretion)		

SATURDAY, DECEMBER 5, 2020

8:30am - 8:55am	Registration and Housekeeping		
9:00am to 3:00pm	Group Study Session	Jessica Allen, EA Sheila Sutton, EA, President Kathy Hallford, EA	6Hrs. CPE

NOTE: Once you have passed the test, a total of 6Hrs. of CPE available with certification in the Annual Federal Tax Refresher Course (AFTR) and ability to be in the Annual Filing Season Program (AFSP)



AL NATP Federal and State Updates
December 4, 2020

American Financial Management
2131 Data Drive Suite 250
Birmingham, AL 35244
205-987-8700
8:30 AM to 4:30 PM

Name: _____ Customer ID#: _____

Designation(s): _____ License #: _____ PTIN #: _____

Address: _____

City: _____ State: _____ Zip: _____

Email: _____ Phone: _____

Emergency Contact Name & Phone Number _____



Registration Fee		
NATP Member	\$95	
Non-Member	\$115	
Guest Meal Ticket	Includes Friday Roundtable Luncheon	\$10

Note: Receive a 15% discount when registering for both this event (2020 In Person Federal and State AL Tax Updates) and the Dec. 5, 2020 Study Session for AFSP Certification event. Both registrations must be completed at the same time.

REGISTRATIONS MUST BE RECEIVED AT NATP BY CLOSE OF BUSINESS WEDNESDAY DECEMBER 2, 2020, AFTER 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 October 27, 2020 to receive a refund. Cancellation is subject to a \$50 fee.



NATP Alabama Chapter
Study Session of AFSP
Certification

Dec. 5, 2020
8:25 am – 3:00 pm

American Financial Management Inc.
2131 Data Office Dr. Ste 250
Hoover, AL 35244
205-987-8700

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	\$40
Non-Member	\$60

Note: Registration includes morning snacks and if needed, a lunch.

NOTE: Before registering for this event, you must be registered for the National NATP Annual Federal Tax Refresher Self- Study (AFSP) course. To register for the AFSP course, log into the NATP Website (www.natptax.com). You can also purchase the printed book on the website. **It is important that you download or print the material and start studying the materials, on you own, prior to attending this study session. AFSP registration fee with National: Members: free; and non-members \$116.00**

REGISTRATIONS MUST BE RECEIVED AT NATP BY CLOSE OF BUSINESS DEC. 3, 2019 AFTER THAT DATE, PLEASE REGISTER AT THE DOOR.

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 Nov. 27, 2012 to receive a refund. Cancellation is subject to a \$35 fee.

Visit us on:
 Facebook page
 Alabama NATP
 And
www.natptax.com

Facebook

Don't forget to check out our Facebook group! The group is closed, so we can ask our peers questions about tax situations our clients are facing, or for advice, or just share information. Please remember to not post personally identifying information about your clients or others. The group can be reached at <https://www.facebook.com/groups/210377679417271> or by searching for Alabama NATP in Facebook



SPRING FLING 2020

In the midst of COVID 19, we were still able to hold an in person conference, even after having to postpone from May to June. We were able social distance, network with our peers, and still gain some valuable education. AL NATP would like to thank all of you that came out to help us have a successful conference. We were once again able to raise money for the Baldwin County Sheriff's Boys Ranch with our raffle, and having a fun night of Bingo. Our own, Ms. Nelda Bunch once again raised money during our auction for the Stone-Lewis Scholarship. If we missed you this year, please start planning on joining us May 2021 in Orange Beach AL for our Annual

Spring Fling Conference.

