

Suncoast Chapter



From the President's desk...

July-October 2017



Greetings friends,

It is with tremendous honor and pleasure that I am writing this first letter of my two-year term as President of the **amazing** Suncoast Chapter -- winner of FSEA's Chapter of the Year award **five years in a row!** That award has been granted to our chapter because of the outstanding members and leadership alike.

I have served on the Board of Directors at the State Level for the past six years and have heard firsthand about some of the struggles going on in other Chapters. I want you to know that I truly credit **your participation as members** as the driving force of every successful move we make as a Chapter, and as visible, respected tax professionals within our community.

When I think back to the first NAEA and FSEA Conventions I attended, as well as the first local Suncoast meeting I attended, it was immediately evident to me how blessed we are to have individuals step up and assume leadership roles. These outstanding individuals have spent countless hours organizing and delivering numerous consistent quality events, and they do so wholeheartedly and selflessly for the betterment of others. I knew that I couldn't just sit back and receive from their efforts, I too had to step up in some capacity and contribute. Fast forward a few years and here I am now holding a gavel passed on from so many great leaders before me, leading an incredibly devoted Board of Directors, knowing we too will inspire a whole new generation of leaders to arise from within.

Past President Karen Wiseman, EA, NTPI Fellow has done a tremendous service to our chapter by devoting endless hours of personal time seamlessly carrying on the traditions of the Past Presidents before her, with her phenomenal board of directors, hosting consistent quality social and educational offerings, month after month, and developing loyal members that regularly attend the events, and help to grow our chapter by bringing guests, sponsors, and speakers.

Karen and I are so pleased that our **Treasurer Fred Daus, EA, NTPI Fellow** has been re-elected to serve another two-year term in office, handling the tedious and critical fiscal responsibilities of our Chapter. We are so pleased to welcome to the Executive Committee our newly elected **Vice President JoAnn Avery, EA**, who brings to the table great insight from her past leadership roles elsewhere. We also welcome our newly elected **Secretary Tamara Tarrant Smith, EA**. Tammy has already hit the ground running displaying great ownership and delivery of her vital recordkeeping responsibilities. Supporting our officers and members we look forward to the returning and future accomplishments of our devoted Committee Chairs including **Ken Santorello, EA, NTPI Fellow** as Membership Chair, who has been instrumental in the steady growth of our Chapter thus far. We welcome **Sheila Hayward, EA**, who has embraced the challenging task of continuing the fabulous work of our former Education Chair **Nichole Morales, EA, NTPI Fellow**. Another promising leader we welcome back to the Board this year in her new role as our Public Awareness Chair is **Robin Rae Alvarez, EA**. I believe Robin will bring the face of Suncoast Chapter into the public light within our Tri-County area like never seen before, driving recognition of the Enrolled Agent designation and customers to the loyal members of our Chapter. Celebrating your choice to become members and fostering those relationships by planning social and networking events is our new Sunshine & Entertainment Chair, **Edna Jones, EA**. Edna brings a heart and passion to this role that I know you will surely enjoy.

My team and I truly have some remarkable accomplishments to follow, and look forward to the challenge of finding new paths of growth and development for our Chapter.

Laura M. Vensel, EA, NTPI Fellow
President Suncoast Chapter FSEA

2017 - 2019

Suncoast Chapter Educational Offerings ...

One of the defining factors of an Enrolled Agent is that the tax practitioner has obtained enough expertise in the area of taxation to pass a three-part comprehensive IRS test covering individual and business tax returns, or through experience as a former IRS employee. Maintaining this elite designation requires completing 72 hours of continuing education courses every three years. Our Chapter is dedicated to bringing live educational opportunities to you on a regular basis that will help you become and remain one of the sharpest tax minds in our community.

Our hope is that you will attend every event possible so that you are introduced to and connected with experts in and around our community, whom with you can build relationships. The topics are carefully selected so that you obtain unique knowledge that you can apply in your practice, expanding the repertoire of clients you can serve and services you can offer.

The Suncoast Chapter Educational Calendar is a constant growth and work in progress. Please subscribe to and read your e-vites (email invitations) for the most up to date information weekly. If you are not presently receiving an email invitation to each of our events, please email fseasuncoast@gmail.com and we will immediately add you to the e-vite contact list. Spam filters can interfere with these invitations, so please adjust your safe senders lists and spam filters to allow delivery from FSEA Suncoast Chapter Events evite@mailva.evite.com. Call the Chapter President at 727-489-4555 to report and resolve any evite issues.



**Prime Rib, Mahi Mahi,
Roasted Vegetables,
and
Outstanding
Tax Law
Education!**

Come enjoy food and fellowship while earning CE credits at our monthly Chapter dinner meeting. **The cost of the CE credits is \$40 member/ \$55 non-member and includes dinner!** Please RSVP to fseasuncoast@gmail.com if you plan to attend and did not get an email "evite" invitation. Payments are collected at the door. RSVP is required.

Dinner Meetings are held at the

Feather Sound Country Club, 2201 Feather Sound Drive, Clearwater

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| July 27, 2017 | Feather Sound Country Club 5:30 PM 2.0 CPE
The Application Process for Tax-Exempt Organizations by David Kinser, EA, NTPI Fellow |
| August 24, 2017 | Feather Sound Country Club 5:30 PM
Representation – Case Studies and Practice Pointers for Newbies and Oldies 2.0 CPE
by Aaron Whitaker, EA |
| September 28, 2017 | Feather Sound Country Club 5:30 PM
The Taxation of Rental Real Estate 2.0 CPE
by Jeffrey Schneider, EA, CTRS, NTPI Fellow |
| October 26, 2017 | Feather Sound Country Club 5:30 PM
Understanding Trusts 2.0 CPE
by Robert N. Bedford, Ph.D, EA, JD |
| January 6, 2018 | Holiday Inn Tampa 8:00AM
700 N. Westshore Blvd, Tampa, FL 33609
1040 Tax Update Workshop 8.0 CPE
by Jerry Joyce, EA & Michael Carlisle, EA, NTPI Fellow |
| January 25, 2018 | Feather Sound Country Club 5:30 PM 2.0 CPE
The Taxation of Athletes, Authors, and Entertainers
By Jeffrey Schneider, EA, CTRS, NTPI Fellow |

**Email Laura and REQUEST OUR E-VITE INVITATIONS:
fseasuncoast@gmail.com**

Suncoast Photo Gallery...



**Priceless Networking,
Food, Fun, & Fellowship**

*Kudos to our 2017 Suncoast Fly-In Participants
Robin Alvarez, EA and Michael Carlisle, EA*



***FSEA Suncoast Chapter After
Tax Season Social Event***

***Thursday, July 20, 2017 at 6:00
PM***

***The Stone Soup Company 1919
East 7th Avenue Tampa, FL
33605***



Suncoast Super Social & Networking Events...

Save the Date...

FSEA Holiday Party

Thursday, December 7, 2017 at 6:00 PM

*The Crafted Plate Restaurant inside
Marriott St Pete/Clearwater*

*12600 Roosevelt Blvd N, St.
Petersburg, FL 33716*

\$30.00 per person/\$60. couple

\$20 Gift Exchange & Delicious Dinner

Teddy bEARs 4 Kids Collection !!!

If you have never been to our **Tax Pro Networking Breakfasts** you are missing out on some **great tax discussions** in a small group setting.

Additionally, all those in attendance are asked to **bring \$1 cash + your business card**. **The \$1 will be part of a 50/50 raffle** and before leaving, everyone will pull a name and whoever's business card you pick, will be your mentor for the month.

If you have a **tax issue, need to discuss a position on a return, or you have a practice issue** ...you will connect with a mentor and meet new contacts in your area! It is a great way for us to help each other out and learn at the same time!



Suncoast Networking Breakfast Schedule...first Fridays

7/7/17	Chapter Networking Breakfast, I-HOP Restaurant, 30200 US Hwy 19 N, Clearwater 8:30 AM
8/4/17	Chapter Networking Breakfast, Perkins Restaurant, 8841 Park Blvd, Seminole 8:30 AM
9/1/17	Chapter Networking Breakfast, Perkins Restaurant, 5002 E. Fowler Ave, Tampa 8:30 AM
10/6/17	Chapter Networking Breakfast, Bob Evans Restaurant, 10119 Horace Ave, Tampa (BRANDON) 8:30 AM
11/3/17	Chapter Networking Breakfast, IHOP Restaurant, 30200 US Hwy 19 N, Clearwater 8:30 AM
12/1/17	Chapter Networking Breakfast, Perkins Restaurant, 8841 Park Blvd, Seminole, 8:30 AM
1/5/18	Chapter Networking Breakfast, Perkins Restaurant, 5002 E. Fowler Ave, Tampa 8:30 AM

News from...



NOVEMBER 2017 FSEA NOMINATIONS

GOVERNANCE YEAR 2018 - 2019

CALL FOR NOMINATIONS

THE FSEA BOARD of DIRECTORS

Deadline November 10, 2017

Have you noticed leadership qualities in yourself or another EA? All active FSEA and Suncoast Chapter members are invited to nominate yourself or a fellow EA for the upcoming FSEA elections!

JANUARY 2018 EDUCATION

Registration is open now!

IRS Liaison Updates + 8.0 CPE Workshop

January 12-13, 2018

Imperial Swan Hotel 7 Suites, Lakeland

Visit fseaonline.org to register

CONVENTION 2018 IS ON THE HORIZON!!

Come out and celebrate the 40th Anniversary of FSEA!!

JUNE 14-16, 2018 – WESTIN, LAKE MARY, FL.

**The FSEA Board of Directors meeting will be held on June 16, 2018.
This meeting is open to all members.**



Interested in Representation Education? Do not miss...

NATIONAL TAX PRACTICE INSTITUTE - November 8-10, 2017 – Orlando

A Tax Preparation Educational track will also be offered.

Register at the NAEA.org website

NTPI Level 1 is also available online.

DECEMBER 2018 NAEA VOTING

Show your support for our Florida Enrolled Agents on the NAEA ballot.

Jerry Gaddis, EA, NTPI Fellow ...nomination as President Elect

Roberto Pons, EA, NTPI Fellow ... nomination as Director

Michael Carlisle, EA, NTPI Fellow running from floor as Director

Community Outreach...

For the past few months, the Members of our Suncoast Chapter of FSEA have collected and distributed school supplies for local school students in need, as well as travel-sized toiletries (shampoos, soap, lotions, etc.) for distribution within our community. Originally, the toiletries were planned for local shelters, but due to the Hurricane and the devastation it caused, we decided to send our September 2017 collection to the Puerto Rico disaster relief efforts.

DONATE

School Supply Drive



Toiletries Drive



On Saturday, September 30th, 2017, we donated approximately 550 items in three full cases to the Homeland Security collection effort. They will be shipped and distributed within Puerto Rico.

Our October 2017 member donations will be distributed to local domestic violence shelters in Pasco, Pinellas, and Hillsborough County.



THE TAX PROFESSIONALS!

Mailing Address: Suncoast Chapter
 Attn: Fred Daus, EA – Treasurer
 600 Bypass Drive, Ste 103
 Clearwater, FL 33764

FseaSuncoast@gmail.com

Chapter Phone: 727-489-4555



Welcome to the 2017-2019 Suncoast Executive Committee...

- | | |
|--------------------------|--|
| President | Laura M. Vensel, EA, NTPIF
laura@taxnoticehelp.com
813-924-4226 |
| Immediate Past President | Karen M. Wiseman, EA, NTPIF
karen@wisemantax.com
727-364-7552 |
| Vice President | JoAnn Avery, EA
JAvery@csj-services.com
813-416-8401 |
| Treasurer | Fred Daus, EA
freddaus@frederickjames.com
727-230-0713 |
| Secretary | Tamara Smith, EA
Acc4success@aol.com
727-403-3350 |

PTIN Renewal

Renew your preparer tax identification number (PTIN) between October 16 – December 31 each year at <https://www.irs.gov/tax-professionals/ptin-requirements-for-tax-return-preparers>

Is it time to renew your EA License??? The EA License Renewal cycle is every 3 years based on the last digit of SSN. The upcoming renewal cycle, November 1, 2017 - January 31, 2018 is for Enrolled Agents with Social Security Numbers ending in **7, 8 or 9** (see IRS Form 8554, Pay.gov, and [Circular 230](#) Section 10.6(d) for details and procedures).

Social Security No. Ends in:	Cycle Ends	Due Date of Renewal
0, 1, 2, 3	12/31/18	01/31/19
4, 5, 6	12/31/19	01/31/20
7, 8, 9 or no Social Security no.	12/31/17	01/31/18

READY TO JOIN? MEMBERSHIP IN SUNCOAST ...

We welcome all EAs to attend our monthly chapter dinners (CE credits), monthly breakfast networking, and all other chapter workshops and events. We encourage all EA's in our Chapter area to join.

The Chapter Membership dues is ONLY \$40.00 annually.
 Associate Chapter membership is available to non-EAs for \$40.00 annually.

All membership inquiries can be directed to Ken Santorello 813-280-4907, our Membership Chair

YOU MUST BE A MEMBER IN GOOD STANDING WITH BOTH NAEA AND FSEA FOR MEMBERSHIP

IMPORTANT: Membership in NAEA/FSEA does not automatically enroll you in the Chapter.