



National Society of Tax Professionals
&
Virginia Society of Enrolled Agents



Present

2017 Federal Update Seminars

16 Hours CE Credit for EAs, CPAs, and other Tax Professionals
TWO LOCATIONS:

Thursday-Friday, November 30-December 1, Holiday Inn Williamsburg-Historic Gateway

Monday-Tuesday, December 11-12, Hilton Springfield

\$355 for Members of NSTP or VASEA Before October 31, 2017

\$380 for Members After November 1, 2017

\$405 for Non-Members Before October 31, 2017

\$430 for Non-Members After November 1, 2017

An in-depth study of federal tax law and tax updates for 2017 as related to federal taxes. Covered topics include 2017 tax legislation detailed information, examples, and selected draft IRS forms. At the completion this program, participants will be able to differentiate federal tax law changes from the previous year, identify updated forms and rule changes and apply rules of federal tax law to preparing tax returns.

Federal Tax Law

- **§1** Tax Rate Schedules for 2017 and 2018
- **§23** Nonrefundable Adoption Credit
- **§25B** Tax Credit for Retirement Plans: Saver's Credit
- **§32** Earned Income Credit Limitations
- **§63** Standard Deduction Amounts
- **§68** Adjusted Gross Income Thresholds for Reduction of Schedule A Itemized Deductions
- **§101(g)(D)(3)** Excluded Benefits from Qualified Long-Term Care Coverage
- **§135** Interest from U.S. Savings Bonds Used to Pay Higher Education Tuition and Fees
- **§137** Employer Adoption Assistance Exclusion
- **§151** Personal Exemption Amounts and the Issue of Phase-out
- **§162** Standard Mileage Rates
- **§162(1)** Health Insurance Premium Deduction for the Self-Employed Taxpayer
- **§213(d)(10)** Long Term Insurance Premium Deductions Based on Age
- **§219** Traditional IRA Contribution Limits
- **§221** Student Loan Interest Deduction
- **§222** Deduction for Qualified Higher Education Expenses
- **§274(n)(3)** Meal Allowance Deduction for Certain Taxpayers
- **§280F** Luxury Auto Depreciation Dollar Limits and Lease Inclusion Add-Back Amounts
- **§408A** Roth IRA Contribution Limits
- **§465** At Risk Limitations: Schedule C and Schedule E Issues and Form 6198 Reporting Requirements
- **§469** Passive Activity Rules applied to Rental Real Estate and Schedule E
- **§530** Coverdell Education Savings Plans
- **§6159** Administrative Relief for Entering Into an Installment Agreement with the IRS
- **§6654** Safe Harbor Rules and Waiver of Penalty for Required Estimated Tax Payments
- **§6654** Safe Harbor Rules for Required Estimated Tax Payments
- 2017 and 2018 Exclusion Amounts for Form 706 Estate Tax and Form 709 Gift Tax
- 2017 and 2018 Threshold Amounts for Social Security and Specific Pension Contribution Provisions
- Definition of Limited Partner for Purposes of Self-Employment Tax: (Proposed Reg. **§1.1402-(a)-2(h)(3)**)
- Education Program Comparison Sheet
- **Form 8082**: Notice of Inconsistent Treatment of Schedule K-1 items

- Retirement Fund Portability Rules
- Updated Threshold amounts for Tax Provisions affecting Gross Income §1 Tax Rate Schedules for 2017 and 2018
- Definition of Limited Partner for Purposes of Self-Employment Tax: (Proposed Reg. **§1.1402-(a)-2(h)(3)**)
- Education Program Comparison Sheet
- **Form 8082**: Notice of Inconsistent Treatment of Schedule K-1 items
- Retirement Fund Portability Rules
- Updated Threshold amounts for Tax Provisions affecting Gross Income
- Discuss Traps in Preparation

Federal Tax Update

- New Tax Legislation in 2017
- Current Year Tax Court Cases
- **§4980H** Share responsibility for employers regarding health coverage
- **§5000A** Shared Responsibility for individuals including exemptions on **Form 8965**
- **New Updated §6721** Penalties for Failure to File Correct Information Returns
- **New Updated §6722** Penalties for Failure to Furnish Correct Payee Statements
- The Health Care Act including **§36B** Premium Assistance Credit and updated **Form 8962**
- Review of Path Act
- Discuss Trump Administration Tax Proposal

Thursday-Friday, November 30-December 1, 2017 - Williamsburg

Holiday Inn Williamsburg-Historic Gateway 515 Bypass Road, Williamsburg, Virginia 23185

The group rate is \$99.95 per night plus tax. To get the group rate, you must call the hotel directly at (757)229-9990 and ask for the "Virginia Society of Enrolled Agents" rate.

Monday-Tuesday, December 11-12, 2017 - Springfield

Hilton Springfield, 6550 Loisdale Road, Springfield, Virginia 22150. There is no group sleeping room rate for this seminar. For room reservations, please contact the hotel at (703)971-8900.

Pricing, Discounts, & Refunds

Member pricing applies to members of NAEA, NSTP, VASEA, associates of VASEA, their spouses and staff.

Save \$25 on registrations postmarked on or before October 31, 2017.

Companies registering more than two of their employees receive an additional discount. Companies may subtract 5% for 3-5 registrations, 10% for 6-10, and 15% for 11 or more attendees. Payment must be made by company check or credit card.

Registration includes continental breakfasts, lunches, morning and afternoon coffee breaks, and handout materials.

Refunds will be honored if written notification is received at the Administrative Office at least 10 days prior to the event. A processing fee of \$25 will be deducted from the refund. Cancellations within 10 days of the event will not be accepted. "No Shows" will forfeit their fees. Substitutions are allowed.

Meeting Attire & Room Temperatures

Meeting attire for attendees is business casual. Temperatures will vary. For your comfort, please wear layered clothing.

Questions

Contact the VASEA office at (804) 723-5888 or email admin@vasea.org.



2017 Federal Update & Review Course



Registration Form

Complete and mail or fax to:

Virginia Society of Enrolled Agents (VASEA), P.O. Box 2873, Mechanicsville, VA 23116

Fax - (804) 452-7510

Please print or type. Use separate form for each registrant.

Name _____ Badge Name / Nickname _____

Professional Designations (EA, CPA, etc.) _____ PTIN (Required for IRS CE Credit) _____

Address: _____ City _____ State _____ Zip _____

Work Phone(_____) _____ Email _____

VASEA Member/Associate [] yes [] no

NSTP Member/Associate [] yes [] no

Special Dietary Needs _____

Please check all that apply:

WILLIAMSBURG – Nov. 30-Dec. 1, 2017

- Two-Day Seminar (16 Hours IRS CE)**
Members - \$380 / Nonmembers - \$430

SPRINGFIELD - Dec. 11-12, 2017

- Two-Day Seminar (16 Hours IRS CE)**
Members - \$380/ Nonmembers - \$430

- This is my first VASEA meeting.
- I am interested in VASEA membership information.

Early Bird Discount - If postmarked on or before **October 31st** you may subtract \$25 from your total registration fee.

Late Registration Fee - If postmarked on or after **November 15th** please add \$25 to your total registration fee.

Total Due: _____

- Check - Make payable to VASEA and mail to:
P.O. Box 2873, Mechanicsville, VA 23116

- Credit Cards Accepted
VISA, MasterCard, Discover, and AMEX

Credit Card Number _____

Expiration Date _____ Security Code _____

Name on Card _____



2017 Federal Update & Review Course



Sponsorship Opportunities

Maximize your visibility with over 100 tax professionals at VASEA's biggest tax seminar of the year.

- Meet new colleagues
- Expand your client base
- Create goodwill and build relationships
- Introduce your latest products and services

Lunch Sponsor (2 available): \$500

- Recognition on VASEA website
- Complimentary email advertisement to attendees (to be sent by VASEA)
- Attendee mailing list
- One 6 ft Table Top Exhibit Space
- 15 minutes of speaking time following lunch in the seminar meeting room. Speaking day determined by first come, first served.
- Lunch and breaks both days

Breakfast Sponsor (3 available): \$300

- Recognition on VASEA website
- Complimentary email advertisement to attendees (to be sent by VASEA)
- Attendee mailing list
- One 6 ft Table Top Exhibit Space
- 5 minutes of speaking time after morning announcements. Speaking day determined by first come, first served.
- Lunch and breaks both days

Tabletop Exhibitor (10 available): \$250

- Recognition on VASEA website
- Attendee mailing list
- One 6 ft Table Top Exhibit Space
- Seminar meals included.

Name _____ Title _____

Company _____ Badge Name / Nick Name _____

Company Address _____

Phone(_____) _____ Email _____

Which location do you plan to attend: Springfield Williamsburg

Check each of the days you plan to attend: Day 1 Day 2 Both Days

Would you like to donate a door prize? (Check one) Yes No

Total Due: _____

Check - Make payable to VASEA and mail to: P.O. Box 2873, Mechanicsville, VA 23116

Credit Cards Accepted: VISA, MasterCard, Discover, and AMEX

Credit Card Number _____ Expiration Date _____ Security Code _____