

AFIT SUMMER TAX SEMINAR

AS OF 6/9/2023

**July 21, 2023
8:30 AM to 5:00 PM**

Desert Willow Conference Center

4340 East Cotton Center Boulevard
Phoenix, Arizona 85040

Register at www.azitaz.org

8:00 AM – 8:30 AM 8:30 AM	<u>LOGIN / REGISTRATION</u> <u>WELCOME</u>
8:35 AM - 9:25 AM	<u>ARIZONA DEPARTMENT OF REVENUE – MID-YEAR UPDATE</u> <i>Rob Woods</i> <i>AZ DOR</i>
<i>BREAK</i> 9:25 – 9:40 AM	
9:40 AM – 11:20 AM	<u>SECURE ACT(s); DETERMINING THE TAXABLE DISTRIBUTION</u> <i>Stephanie Sterling</i> <i>EA</i>
11:25 AM – 12:15 PM	<u>INTERNAL REVENUE SERVICE – MID-YEAR UPDATE</u> <i>Melissa Chapman</i> <i>Local Taxpayer Advocate</i> <i>Lisa Novack</i> <i>Senior Stakeholder Liaison</i>
12:15 PM – 1:00 PM	LUNCH
1:05 PM – 2:45 PM	<u>EMPLOYEE RETENTION CREDIT: CLAIMING THE CREDIT and REPRESENTING A CLIENT IN AN ERC AUDIT</u> <i>Bradley Burnett</i> <i>Attorney, CPA</i>
<i>BREAK</i> 2:50 PM – 3:10 PM	
3:10 PM - 4:00 PM	<u>FORM 1099-K – WHAT’S COMING</u> <i>Jaye Tritz</i> <i>EA</i>
4:00 PM – 4:50 PM	<u>CORPORATE TRANSPARENCY ACT</u> <i>Ed Zollars</i> <i>CPA</i>

PLEASE NOTE; SPEAKERS AND SUBJECTS MAY CHANGE DUE TO AVAILABILITY

7 hours CPE – Tax Law; 1 hour CPE – Update;
NOTE: Some sessions focused solely on Arizona state tax issues may not qualify
for Enrolled Agent Circular 230 CPE credit.

SAVE THE DATE: January 18, 2024

AFIT’s Winter Tax Seminar

Why you should attend this AFIT Summer Tax Seminar:

- *Timely Topics presented by knowledgeable practitioners.*
- *Option to attend in person or on-line.*
- *Updates from Internal Revenue Service and AZ Department of Revenue.*
- *Opportunity for in-person attendees to meet with Taxpayer Advocate Service representatives or Account Resolution advisors from DOR on problem cases. Bring properly-executed, signed Forms 2848 or AZ Form 285.*
- *Update with Ed Zollars, CPA, on Corporate Transparency Act, which will likely affect your S-corp or LLC business clients. FinCEN reporting. Be ready!*
- *Bradley Burnett, Attorney and CPA, will guide us through eligibility for the Employee Retention Credit, and IRS audit focus on ERC refunds (over \$150 Billion refunded as of May, 2023, and 800,000 claims pending).*
- *A session on Form 1099-K reporting, presented by Jaye Tritz, EA.*
- *An analysis of recent changes in retirement income tax policies and their impact. Presented by Stephanie Sterling, EA and Financial Advisor.*
- *Downloadable course materials: AFIT will make available downloadable seminar materials for ALL technical topics to save on your laptop, tablet or similar electronic device. If you wish, you may print out the materials for your future reference.*
- *Desert Willow Conference Center is a clean, modern facility with excellent, healthy food choices, and safe, convenient and free parking. Meals and breaks are included in the registration fee.*
- *AFIT believes this seminar/webinar is a safe way for tax practitioners to access high-quality tax education in a professional setting.*
- *In-person attendees will have ample opportunity for networking.*
- *Easy on-line registration*
- **GREAT CPE VALUE – 8 hours of CPE for less than \$200.**

20% Discount for Early Registration: Register and pay on or before Thursday, July 13th, 2023 and save.

Seminar/Webinar cost: \$245 (\$195 on or before 11:00 PM July 13, 2023)

Last day for registration: July 17, 2023 by 11:00 PM

[Click Here to Register](#)