

Kathryn Morgan, EA, NTPIF, USTCP



Kathy Morgan just completed her 24th tax season with H&R Block as a Master Tax Advisor

She earned her Enrolled Agent license in 2002 and has completed the prestigious National Tax Practice Institute Fellowship (NTPI).

Kathy has been an instructor and writer on income tax for 18 years.

Representation of clients at all levels of audit from the IRS, all states and in front of the United States Tax Court.

Kathy lives and practices in the Shreveport Louisiana area and when not “talking tax” she enjoys spending time with her grandchildren and family, writing and reading.

Entity Classifications and The Tax Ramifications – 2CE – 3826W-T-00140-I

This course presents and explains the various types of entities available for conducting business, how these entities are created and operate. It further explains the entities' and owners' potential legal liabilities. Tax reporting requirements at the entity and owner levels for the different entities is also explained.

Field of Study: Taxes

Knowledge Level: Basic

Delivery Method: Group Live

Due Diligence: It's not just about EIC anymore! 2CE – 3826W-E-00139-18-I

Today's climate of due diligence applies to more of a tax professionals job than ever. We face the daunting task of balancing our responsibilities between the IRS, our license, and our client's best interest. Discussions will focus on how to stay in compliance with Cir. 230 while being the taxpayer's advocate. Case studies will provide hands-on practice in making decisions; how to handle conflicting requirements; and penalties for non-compliance.

Field of Study: Taxes

Knowledge Level: Basic

Delivery Method: Group