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22 Hidden Ridge Common, Williamsville, NY 14221

2021 NYSSEA 34th ANNUAL CONFERENCE

SPEAKER APPLICATION

DUE DATE: Friday January 8th, 2021

Please contact Jim Otton, EA at james.otton.ea@gmail.com (917-912-0660) with any questions.

Please answer all questions completely.

Note: Please fill out the entire application, even if you have presented at NYSSEA recently, as there are some changes to this application.

Last Name

First Name

Initial

Street Address

City, State and Zip

Preferred contact number

Best time to call

Email address

Members Licensed to Represent Taxpayers before the Internal Revenue Service

Speaker General Information

1. Are you an NAEA member in good standing? ☐ Yes ☐ No

For Enrolled Agents, NYSSEA endeavors to follow NAEA policy of engaging only member EAs in good standing at educational events. Attorneys and CPAs are strongly encouraged to be Associate members.

2. Please check the appropriate professional designation(s):

☐ Enrolled Agent

☐ Certified Public Accountant

☐ Tax Attorney

☐ USTCP

☐ Other _____

3. Are you an NTPI Fellow? ☐ Yes ☐ No

4. List your educational background and areas of occupational experience.

Please attach additional pages if necessary.

5. How many years have you been a tax practitioner? _____year(s)

6. What percentage of your practice is:

Representation _____ *Preparation* _____ *Teaching* _____

Previous Presentation Experience

1. Have you taught for NAEA or NYSSEA before? ☐ Yes ☐ No

Other tax associations? ☐ Yes ☐ No

2. Please list your speaking engagements for the past three years (or email a list directly to Jim Otton, EA at james.otton.ea@gmail.com). Be sure to note the date, topic and organization.

3. References: Provide a contact, phone number, and names of two organizations (one can be NAEA/Affiliate) who can provide a recommendation on your speaking/instructor skills.

4. We prefer the use of PowerPoint for our programming. Are you comfortable using PowerPoint?

☐ Yes ☐ No

Presentation Topics

Please tell us about your presentation area(s) and topic(s).

1. What general presentation topic area(s) do you prefer?

Select all that apply.

- ☐ Tax Preparation
- ☐ Ethics
- ☐ Representation

2. Select your area(s) of subject matter expertise. Checking a subject indicates a willingness to teach/develop material in this category. Additional areas of expertise are welcome. Please use the Comments section below to list or email additional topics directly to Jim Otton, EA (james.otton.ea@gmail.com). We are also very interested in any classes which encourage attendee participation or feature role-playing (e.g. representation scenarios between EAs and clients or IRS staff, Tax Court, etc.)

☐ Representation (e.g. Appeals, Audits, Collections, IA's, FOIA, General Rep, Penalties, Non-filers)

☐ Ethics (OPR and Circular 230)	☐ Estates (non-fiduciary)
☐ Tax Court	☐ NYS Residency
☐ Employee Stock Options	☐ NYS Estate Tax Issues
☐ Capital Gains and Losses (Schedule D)	☐ Retirement Planning
☐ Disposition of Assets (Form 4797)	☐ S Corps (introductory)
☐ Depreciation	☐ S Corps (intermediate/advanced)
☐ International Tax Issues	☐ Partnerships (introductory)
☐ Form 1040NR	☐ Partnerships (intermediate/advanced)
☐ Military Taxpayers	☐ Basis
☐ Clergy Returns	☐ Section 1031 Exchanges
☐ Estates (fiduciary) & Trusts	☐ Section 1035 Exchanges

Comments:

3. In order to provide our Conference attendees with original courses, do you plan to present any of your chosen topics elsewhere prior to October 22nd, 2021?

- ☐ Yes ☐ No

34th Annual NYSSEA Conference Date & Deadlines

1. Classes are expected to be taught on Friday, Saturday, Sunday and Monday (October 22nd - October 25th, 2021). Do you have any conflict with teaching any of these days?

☐ Yes ☐ No

If yes, please explain:

2. We are currently planning to hold an in-person Conference in October of 2021. However in order to comply with any NYS Department of Health regulations in effect at that time and to ensure the health and well-being of our attendees, the Conference Committee may determine that an in-person format is not feasible. In the event of a virtual conference, the dates are expected to be Friday October 22nd - Thursday October 28th, 2021.

Do you have any conflict with teaching any of these days? ☐ Yes ☐ No

If we decide we need to hold a virtual conference, are you willing to present in a Zoom Webinar format?

☐ Yes ☐ No

Have you presented in a virtual format in the past? ☐ Yes ☐ No

Would you be willing to have your presentation live-streamed? ☐ Yes ☐ No

Would you be willing to have your presentation recorded and made available to Conference attendees for a limited time? ☐ Yes ☐ No

3. To effectively plan for the upcoming conference, deadlines are vital. Are you able to meet the deadlines listed below?

☐ Yes ☐ No

Anticipated Deadlines (subject to change):

February 26, 2021: Signed speaker contract, completed Form W-9

March 19, 2021: Bio, photo, class title and 70-word course description

September 10, 2021: Travel arrangements/itinerary

September 20, 2021: Presentation handouts & slides

Compensation and reimbursement to be discussed upon invitation to our conference.

REMINDER! Please send Jim Otton, EA any additional information you would like considered for your application. You can add any comments you have here:

I attest that all the information provided herein is, to the best of my knowledge, true, accurate, and complete.

Signature

Date