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NYSSEA | POWERING AMERICA'S TAX EXPERTS

Contact:
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22 Hidden Ridge Common, Williamsville, NY 14221

# 2020 NYSSEA CALL FOR SPEAKERS

## 33rd ANNUAL CONFERENCE
## TURNING STONE, VERONA, NEW YORK
## OCTOBER 23-26, 2020

*Please answer all questions completely, typed responses preferred.*

*All applicants must be Enrolled Agents, CPAs, or Tax Attorneys with representation or tax preparation expertise.*

*A formal application is required for ALL interested speakers.*

*Please contact Michele Eaton, EA at michele.eaton@gmail.com with any questions.*

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

**DUE DATE: DECEMBER 15, 2019**

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**

## CE Speaker General Information

1. Please check the appropriate professional designation(s):
   ☐ Enrolled Agent ☐ Certified Public Accountant
   ☐ Tax Attorney ☐ USTCP ☐ Other ___________________________________

2. List your educational background and areas of occupational experience. Please attach additional pages if necessary.

   ________________________________________________________________________________

   ________________________________________________________________________________

   ________________________________________________________________________________

3. How long have you been a tax practitioner? _____year(s)

4. 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.*

5. Are you an NTPI Fellow? ☐ Yes ☐ No

6. What percentage of your practice is:
   *Representation* ________ *Preparation* _________ *Teaching* _________

7. Have you ever taught at NAEA or NYSSEA? ☐ Yes ☐ No Other tax associations? ☐ Yes ☐ No
   a. Which? ☐ NAEA ☐ NYSSEA ☐ Other
   b. When? _________________________ Attach details ____________________________________

8. Please attach a list of your speaking engagements for the past three years. Be sure to note the topic and organization, particularly any instruction for NAEA and state affiliates.

9. 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 specifically in the area of tax representation or preparation.
   a. Contact ___________________________________ Phone _______________________________
      Organization ______________________________________________________________________
   b. Contact ___________________________________ Phone _______________________________
      Organization ______________________________________________________________________

10. Please check the general topic area(s) on which you would prefer to speak:

    ☐ Tax Preparation

    ☐ Ethics

    ☐ Representation

11. Classes are taught on Friday, Saturday, Sunday and Monday (October 23-26). Do you have any conflict with teaching any of these days? ☐ Yes ☐ No
    Please explain: ______________________________________________________________

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

13. 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 with detail attached to the application. 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, etc or list below)
    ___ IRS Regulatory Updates
    ___ Ethics
    ___ Schedule D
    ___ Employee stock options
    ___ Disposition of assets
    ___ Depreciation
    ___ Date Security – Written Plan
    ___ Cancellation of Debt
    ___ Employee Stock Options
    ___ Other (list below)
    ___ Estates & Trusts (fiduciary)
    ___ Estates (non-fiduciary)
    ___ Acquiring or selling a business
    ___ S-corps Intro
    ___ S-corps intermediate to advanced
    ___ Partnerships Intro
    ___ Partnerships intermediate to advanced
    ___ Limited partnership K-1's
    ___ Basis (provide detail)
    ___ International Tax issues
    ___ Military Taxpayer
    ___ Like-Kind Exchanges
    ___ Section 1035 Exchanges

    ______________________________________________________________________________

    ______________________________________________________________________________

    ______________________________________________________________________________

14. Use of PowerPoint is part of our program and is preferred. Are you comfortable with PowerPoint?

    ☐ Yes ☐ No

15. To effectively plan for the upcoming conference, deadlines are vital. Are you able to meet the deadlines listed below? ☐ Yes ☐ No

Estimated deadlines (subject to change):

| | |
|---|---|
| January 31, 2020 | Signed speaker contract, completed Form W-9, Bio and photo, Class title and 70-word description due |
| August 30, 2020 | Deadline for any handouts to be included in the Conference Book |
| September 15, 2020 | Travel arrangements/itinerary due |
| September 30, 2020 | A/V requirements list due |

REMINDER! Please be sure to attach:

- A list of your speaking engagements for the past three years, including topics, organization, and audience.
- Any details for a specific class that you are interested in teaching beyond the list provided.

IMPORTANT: In order to fill the schedule with original and informative courses, NYSSEA requires any course scheduled for the conference not be presented anywhere else in New York State in the same calendar year as the conference. If you are offered a speaking engagement at the Conference, you will be asked to sign an exclusivity clause; therefore, please only include course offerings that will not be offered elsewhere in New York during calendar year 2020. Please consult with the Education Committee if you feel that an exception may apply.

All applications and attachments should be returned to NYSSEA no later than Sunday, December 15, 2019. Send your application to Michele Eaton, EA by email (preferred) at michele.eaton@gmail.com or fax to 914-636-0519. Please contact Michele Eaton if you have any questions. The 2020 NYSSEA 33rd Annual Conference Education Committee will review all completed applications submitted timely. We anticipate contacting speakers during late January 2020.

Any instructor engaged to speak at our conference for a course which is intended to qualify for IRS continuing education credits must be familiar with the requirements necessary for the course to qualify under IRS Circular 230 provisions, including course-hour time requirements. This will be included in speaker contracts and your signature thereon signifies your understanding and agreement with those requirements.

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

Signature Date