



Michigan



MICHIGAN CHAPTER - NATP

National Association of Tax Professionals

MI-1040 REPORT

www.MI-NATP.ORG

NOVEMBER 2008

PRESIDENT'S REPORT

As I write this letter to the members of MI NATP, I feel as if I am trying to catch up with the recent events that are shaping our future. We have elected a new President and watched as our home values and financial assets have decreased in value. As tax professionals, we have answered the questions from our concerned clients knowing that there are new tax law changes in the near future. We all know someone who has direct or indirect ties to the automotive industry, who are concerned about their jobs and future employment. There is a lot to process at this critical time in our history. I am certain that you and your staff will have these concerns in mind as you prepare for the tax season that is quickly approaching.

One of the greatest benefits of belonging to NATP is the ability to access their highly trained research professionals which will provide answers to prepare us for this critical tax season. We are lucky that NATP strives to present us with the 1040 & Beyond workshop update sessions every year. Our ability to order Quickfinders and The TaxBook, at a discount, helps MI NATP by providing an excellent reference resource for us to use when discussing our clients' tax questions.

We are indeed fortunate that our MI instructors like Marilyn Meredith and Larry Zimbler are National Instructors with NATP. They teach National update classes nationwide and then return to MI to teach at our state NATP events. In MI, we also have our MI Piggyback Seminars. This fall there were almost 200 in attendance to learn the new changes in MI and city tax law. I strongly encourage you and your office staff to sign up and attend our January seminars in Lansing. These seminars will provide you with the latest changes in Federal and MI tax law.

Finally, I want to thank all of you who have attended our tax seminars this past year. You have been very supportive. From the comments on the evaluations, I am confident that you found the seminars extremely beneficial! I am always pleased when we see so many of participants at our 2 for 1 seminar in September. At this year's seminar more than 200 practitioners attended. Lastly, I wish to you and your families, an early Happy Thanksgiving and the best of Holiday Seasons.

Val Anderson, President

ARE YOU PREPARED?

The tax season is almost here. I ask if you think that you are ready? Do you think that when Congress reconvenes later this month that there will be changes to existing tax law? Do you think these changes will effect the 2008 or 2009 tax year? How will this recently enacted Housing and Economic Recovery Act of 2008 affect our clients? Will I see YOU on January 9, 2009 in Lansing to receive the latest Federal and MI updates for this tax season? NOW is the time to sign up for the ALL DAY MICHIGAN SEMINAR to receive the best and most complete information that will arm and prepare you for the upcoming tax season. Our instructors will also teach the latest information available for the MI Business Tax at this seminar.

In addition, on January 9 there will be the OFFICE PROCEDURES SEMINAR for your office staff. This will prepare them to become a productive member of your office. They will be taught by the experienced team of Candy Mitchell, Byron Kuxhaus, and Matt Livingston. Matt will teach basic tax information. Candy will instruct on the tax office procedures and provide them with the knowledge and confidence to be more productive in your office. Finally, Byron will instruct them on the need and importance of confidentiality.

On May 14 & 15, 2009, come to Grand Rapids to the MI NATP CHAPTER'S 20TH ANNIVERSARY! At this annual convention you will learn from other professionals what worked for them during the tax season. We will have the best information delivered by nationally recognized speakers. See enclosed flyer for more details.

On the seminar evaluations from the September "2 for 1" seminar, ALL (100%) of the attendees said they would recommend the seminar to other practitioners! I want to thank all of you for your continued support.

I appreciate the feedback that I have received at the seminars as you have demonstrated the type of material you would like covered in the future. Thank you for your valuable input.

Happy Thanksgiving Merry Christmas Happy New Year

Glen Mitchell, MI Chapter Vice President

IMPORTANT information pertaining to the MBT DRAFT FORMS!

A link is on the home page of the MI-NATP website.

MI-NATP DEPARTMENT OF TREASURY TRIP

After a 20 year membership to MI-NATP, I decided to attend their annual Michigan Department of Treasury trip to Lansing on Monday, September 29, 2008. The trip was lead by member Jim Barry. Approximately 20 MI-NATP members met at the Michigan Department of Treasury Operations Center Building in Lansing. The governmental complex is quite a building in and of itself. In addition to myself and Chairperson Jim Barry, attendees included: Marilyn Meredith, Jerry Coon, Glen Mitchell, Gayle Compton, Byron Kuxhaus, Deanna Hawkins, Arlene Mundy, Ray Wojciechowski, Kathy Bozman, Kristina Hornaday-Alberts and Karen West. During the course of the day, we met with at least a dozen department representatives. The agenda was directed by Daulton Tansil and Mimi Van Goor who spent the entire day with us.

The cost to participate in this trip was a timely submission of a research question to Jim Barry. The questions are then organized into categories and submitted to the Michigan Department of Treasury. The representatives of the various tax areas research and prepare answers. The department representatives visit and give detail to the questions. While the answers to the questions were enlightening, there is quite a bit of supplementary discussion that is noteworthy. MI-NATP participants were provided with several handouts of the prepared session.

I was very impressed at the in-depth dialog and interaction that took place between the MI Department of Treasury and our members. Tax law is a two way street and both sides take away valuable information. It was beneficial to meet and learn about the different department representatives. Meeting them is helpful in the event you need to contact them in the future. We were able to meet the entire staff of the Practitioner Hotline-all 3 of them.

I highly recommend that all MI-NATP members attend this annual treasury trip at least once to experience the benefits. If you can attend annually you will benefit from any new tax law changes.

JIM BERISH, EA

IRS TAX FORUMS in CHICAGO, IL

I recently attended the IRS tax forums in Chicago and found them to be EXTREMELY helpful and informative. There were numerous topics presented during the 3 day seminars, and I was impressed by the quality of the presentations this year. I have attended these forums in previous years and this was by far the best performance by the IRS. The main theme of the forums was to prepare tax professionals for a new generation of tax clients.

The IRS had several sessions on the aging taxpayer that explored the new challenges that we will encounter in the near future. Our baby boomer clients, will be retiring in the next few years. This generation will not only have a dynamic impact on our economy but on our entire American society. In addition, the IRS officials informed attendees to expect "constant motion" in Social Security regulations over the next few years.

One of the major concerns that is being forecasted to impact the American economy is the number of immigrant workers. The IRS estimated that America now has **22 million people** that do not speak English well enough to comprehend basic tax issues. There is a growing need for bilingual tax professionals due to this influx. These individuals bring a whole different set of circumstances to our profession. We need to brush up on our knowledge encompassing ITINS, as well as, the new due diligence surrounding the EITC.

In summary, the theme of the forums this year was preparation and change. The future holds nonstop changes due to the great shift of income in the economy. We need to adapt our practices now and enhance our offered services in order to embrace these changes. Preparation is the key to remain successful in the upcoming years.

Kristina M. Hornaday-Alberts, CSA

MICHIGAN CHAPTER-NATP WELCOMES OUR NEW MEMBERS!

JOHN ACKER	BRENDA ENSING	CYNTHIA LEWIS	JAMES NYGORD	DEBBIE SHOLES	JAMMIE TONER
PAULA ALDRIDGE	MARTHA JESHURUN	KATHRYN LORD	LOTTIE RAGAN	WARREN SIMS	MARK VANN
DAVID BODDE	TENNA JOHNSON	MARTIN MANN	SARAH RUEGER	NANCY SKRIBA	FLORIAL WILLIS
PAUL COLE	NATASHA JUNGOVIC	GREG MARTIN	JOEL SCHEUHER	WILLIAM SMITH	MICHELLE WING
RICHARD CRON	ALAN KAIP	LOUISE MARTIN	WILLIAM SCHMID	ANN SPINEK	
CHARLEEN DAVIS	KIMBERLEE KING-ZANNETTI	ROGER MILLS	CARRIE SEKELSKY	LYNN STURGESS	

BIG WINNERS AT THE PIGGYBACKS!

During the MI-Chapter Piggyback seminars attendee's names were drawn for their chance to win a Deluxe Edition of TaxBook. The value of \$75 is more than the price to attend the seminar! WOW, what a bargain!

This years winners were:

Teresa Vanderleest, Vicki Gunter, Sharon Robbins, Marsha McCoy-Pfister, Angela Syacsure, Margie Winston, Ronna Applebaum Earnest and Victoria Walley.

This is definitely a great opportunity to get reference material close at hand and ready for the approaching the tax season.

As a new member of the NATP, the MI Chapter offers a benefit of a **free** MI sponsored education seminar. This year we had more new members that used their free education seminar than ever before! At our "2 for 1" seminar in September, we held drawings for free piggyback seminars. Those certificates were utilized this year more than during the piggybacks than previously reported years! As a chapter, we know they were impressed with the 3 hours packed with Michigan and cities information. This is a great beginning to attending many of the other MI-Chapter sponsored seminars.

A special "**Thank You**" to all the volunteers who stepped up and helped at all the seminars. It takes a lot of behind the scene work to provide the members with quality education and materials. It can't be done without the great volunteers.

Kathy Bozman,EA Registration Chairperson

CHARITY REPORT

I am pleased to report that we have collected a total of \$1,837.85 for fiscal year 2008-2009 so far. We collected \$1,157.85 in September and \$680.00 at our May seminar for the Food Bank Council of Michigan. The chapter leadership would like to thank you for your generous donations to stop hunger in Michigan.

Our donations are used to assist in the purchase and transportation of food that is delivered to nine regional food banks. The regional food banks distribute the food to families and individuals in need. Last year over 69 million pounds of food was delivered to 2800 food pantries, kitchens, and shelters. **This food fed ONE MILLION people in Michigan!** Each pound of food is used to make a meal for a hungry person.

The Food Bank Council of MI has supported the food bank network and advocated on their behalf since 1984. Please know **YOU** make a difference! To learn more about the food bank, please visit their web site at fbcml@fcmich.org. Remember that all donations qualify for the MI tax credit for feeding the poor.

Sharon Barry
Charity Chairperson

Long time MI-NATP member Gary McCallumore passed away Sept. 20th. Thanks to all for the generous donation.

Newsletter Committee

**Jim Barry
Kathy Bozman
Jon Garlick
Joe Halfmann
Kristina Hornaday-Alberts
Brian Meredith
Erlinda Meredith
Marilyn Meredith
Glen Mitchell
Candy Mitchell
Lisa Smith
Karen West
Heather Worden
Ray Wojciechowski**

Hiring new people? This is just for you!

Are you planning on hiring anyone new this season for tax preparation or for general office help? As you and your experienced tax preparers are learning all kinds of good stuff to help you through the season at our popular **Michigan Tax Seminar** on Friday, January 9, 2009; Your "new guys" get ready for the season too at the **Basic Tax Preparation & Office Procedures class** being taught just down the hallway.

The first part of this seminar is a review of the basic tax return, similar to what a beginning income tax preparer might experience. We expect participants to have some minimal experience and training before this session. The second part of the day is aimed at the general office help we all need in order to simply get through the day. Reception, managing the waiting room, answering the phone, filing, and everything else you don't want to do, yet must be handled effectively is covered in this three hour block. We will finish the day with the required "scary" discussion of confidentiality. Your office contains a lot of personal information. How do you keep it confined to the walls of your building? Your employees must be made aware of the legal issues involved in working in an income tax office. Hope to see your staff on January 9, 2009.



MICHIGAN - NATP EDUCATIONAL OPPORTUNITIES

January 9, 2009	Michigan Tax Seminar (Flyer enclosed)	Lansing
January 9, 2009	Basic Tax Review & Office Procedures (Flyer enclosed)	Lansing
May 14-15, 2009	MI-NATP 20th Anniversary Convention (Flyer enclosed)	Grand Rapids
September 18, 2009	"2 for 1" Seminar	Lansing
May 20-21, 2010	MI-NATP 21ST Convention	Traverse City

Go to www.MI-NATP.ORG to register online

Important Tips for online registrations by Lawrence Zimble, MST, EA

- Always click "**Finish Order**".
- Make sure you get an order number.
- When registering more than 1 attendee, always continue shopping until all attendees are entered, then "**SEND ORDER**".
 - Verify correct **billing** name, address and zip code. This is the address your credit card bill is sent to.
 - Verify correct email address. Without this, you will not receive your confirmation of registration.
 - Include credentials on registration, if you want them on your certificate/name badge.
 - Online registration only provides for "**authorization**" of your credit card. Your card will be charged later.
 - Bring confirmation email to registration at the seminars.

Address Service Requested

WYOMING, MI 49519
2175 Beverly Ave. SW
NATIONAL ASSOCIATION OF TAX PROFESSIONALS
MICHIGAN CHAPTER - NATP



Michigan