

Michael E Lawrence, EA, *President*
Handel Edwards, EA, PhD, *1st Vice-President*
Phyllis Jo Kubey, EA, CFP, *2nd Vice-President*
Salvatore P Candela, EA, *Treasurer*
Vicki Hermann, EA, *Secretary*



Contact:
Jeffrey R Gentner, EA, *Executive Director*
Email: jgentner@nyssea.org
Phone: 716-616-0104
Web Site: nyssea.org

22 Hidden Ridge Common, Williamsville, NY 14221

2019 NYSSEA CALL FOR SPEAKERS 32nd ANNUAL CONFERENCE SARATOGA SPRINGS, NEW YORK OCTOBER 25-28, 2019

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: Former NYSSEA speakers from 2017 or 2018 simply fill out this first page and attach: (a) a listing of topics you would be interested in teaching and (b) a list of speaking engagements for the last 12 months.

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 25-28). 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 of feature role-playing (e.g. representation scenarios between EAs and clients or IRS staff, Tax Court, etc.)

___ Representation (e.g. Appeals, Audits, Collections, General Rep, Penalties, Non-filers (circle those you would be In teaching)

- ___ Tax Preparation
- ___ 2019 tax law changes
- ___ International Tax issues
- ___ Ethics
- ___ S-corp reasonable comp
- ___ Like-Kind Exchanges
- ___ Other (list below)

___ Trusts/Estates (circle one or both)

- ___ Partnerships
- ___ Basis (provide detail)
- ___ Disposition of assets
- ___ Tax issues of divorce
- ___ Employee stock options
- ___ Publicly-traded partnerships
- ___ Tax Court
- ___ Selling your business
- ___ Social Security issues

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:

- | | |
|--------------------|---|
| January 31, 2019 | Signed speaker contract, completed Form W-9, Bio and photo, Class title and 70-word description due |
| August 30, 2019 | Deadline for any handouts to be included in the Conference Book |
| September 30, 2019 | A/V requirements list due |
| September 30, 2019 | Travel arrangements/itinerary 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.

All applications and attachments should be returned to NYSSEA no later than Monday, December 31, 2018. 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 2019 NYSSEA 32nd Annual Conference Education Committee will review all completed applications submitted timely. We anticipate contacting speakers during late January 2019.

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.

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.

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

Signature

Date