

NYSSEA Board Packet June 5, 2021



Table of Contents

| | |
|---|----|
| Meeting Agenda | 1 |
| President Report | 2 |
| First VP Report | 4 |
| Second VP Report | 5 |
| Secretary Report and Minutes – January 9, 2021 Minutes (Virtual Meetings) | 6 |
| Immediate Past President Report | 9 |
| Association Administrator Report | 10 |
| Director Reports | |
| • Lisa Cancellarich, EA (Membership) | 12 |
| • James Otton, EA (Conference Education) | 15 |
| Brooklyn Queens Chapter Report | 18 |
| Central Chapter Report | 19 |
| Lower Hudson Valley Chapter Report | 20 |
| Metro Chapter Report | 21 |
| Nassau/Suffolk Chapter Report | 22 |
| Western Chapter Report | 23 |
| Governance Committee Report | 24 |
| Awards and Scholarships Committee Report | 25 |
| CE Upload Committee Report | 26 |
| Conference Committee Report | 27 |

Phyllis Jo Kubey, EA, CFP, *President*
Daniel L Coccia, EA, CMA, *1st Vice-President*
Koreen Jervis EA, *2nd Vice-President*
Lynn Senke, EA, *Treasurer*
Vicki Hermann, EA, *Secretary*



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

22 Hidden Ridge Common, Williamsville, NY 14221

AGENDA

NYSSEA BOARD OF DIRECTORS MEETING June 5, 2021

- I. Call to Order
 - Pledge of Allegiance
 - Roll Call
- II. Officers' Remarks
- III. Approval of the Agenda
- IV. Approval of the Consent Agenda
 - Approval of Minutes – January 9, 2021
- V. Unfinished Business
 - a. NYSSEA Employer/Employee status update
 - b. NAEA Minnesota Legal Defense Fund
 - c. Financial Report and Budget FYE 6-30-2022
 - d. NYSSEA governance documents/SOP review
- VI. New Business
 - a. NYSSEA Education Update – NYSSEA virtual webinars
 - b. NYSSEA Conference 2021 - Update and Discussion
 - c. Nominating Committee 2021
 - d. NAEA update – membership data, dues, and initiation fees
- VII. Good of the Order

Members Licensed to Represent Taxpayers before the Internal Revenue Service

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Board Report President June 5, 2021 Board Meeting

First, Congratulations to all of our members who made it through another challenging tax season. The American Rescue Plan Act and the extended filing season required a lot of additional bandwidth and flexibility. We continued our monthly Executive Committee meetings on the third Thursday of each month – except for April 15th.

We've implemented more efficient administrative solutions coordinating our bookkeeping, payroll, and insurance coverage. Many thanks to Lisa Cancellarich and Lynn Senke for their work on this.

Since our last board meeting, we had two successful webinar presentations – a federal tax update with Frank Degen and a deeper dive into COVID-19-related NYS Residency issues with Karen Tenenbaum and her team. We are excited about these online education opportunities, and we will continue to present webinars on a state-wide basis. We look forward to Frank Degen's Ethics Presentation on June 9th. Stay tuned for additional educational opportunities over the summer and into the fall.

The IRS and NYS have also had challenges implementing and communicating about new tax law provisions. Our NYSDTF liaison, Jim Otten, and I pursued our NYSDTF contact relentlessly waiting for word on whether NY would confirm to the federal unemployment exclusion. Although I no longer serve on the IRSAC, I participate regularly in the IRS National Public Liaison practitioner group meetings, am a member of the IRS Refundable Credit Working Group, and recently represented NAEA at a summit on the new Advance Child Tax Credit. I also try to attend the IRS stakeholder liaison First Friday calls.

Our traditional Government Relations activity – a legislative day in Albany – has been on hold since we've had COVID-related restrictions in place. We'll be looking at ways to continue our NYSSEA advocacy efforts.

Our Google Group has been active and a source of great information for our members.

We have a spectacular line-up of speakers and topics for our October conference. One task at this board meeting will be to decide whether to proceed with our Turning Stone live meeting. We had tremendous success with our virtual conference last year. Many members feel strongly about going back to live meetings. Others prefer the virtual format. We want to ensure we have a successful event!

NAEA is working to harness its technology, but many operations are still compromised and require a lot of manual work by the staff. We are just beginning to get member lists and dues revenue from NAEA. We hope things will continue to improve.

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I attended the NAEA board meeting this past week. NAEA's membership numbers are down, and that affects our membership. I reminded the NAEA leadership not to forget the value of the Affiliates in driving membership numbers and value. Many members find the most value in the state/local activities and input, and I hope that NAEA will partner with us in membership recruitment and retention.

The 2021 NAEA State Affiliate Leaders (formerly known as APEX) meetings are virtual – and I hope that many of our NYSSEA leaders will attend on June 7th and 8th.

Many of you know that I was injured and had major surgery in December. My intentions to move forward with NYSSEA business before tax season began were unrealized as I recovered. I promise to make up for lost time, and I look forward to helping our affiliate grow and prosper.

It's an honor and a privilege to serve as an NYSSEA leader and officer. I appreciate all that our prior leaders have done to cultivate and encourage me on this journey. I will do my best to represent NYSSEA's and our members' best interests in all that I do.

Thanks to all of our NYSSEA volunteers and all of our members for everything you bring to make NYSSEA a better resource and community!

Respectfully submitted,

Phyllis Jo Kubey, EA CFP® NTPI Fellow
President, NYSSEA

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Board Report

1st Vice President

June 2021 Board Meeting

What a tax season this has been and it's not over yet! It started out being challenging enough with all of the changes that occurred through the end of last year along with many of us having to modify how we engage with our clients, shifting from in office client appointments to gathering and processing returns virtually. But then to get a mid-season tax change that also challenged us on which filing status to use, waiting on States to sign onto the changes or Not and required the re-filing of some returns completed earlier in the season.

Since our last Board meeting in January, in my role as 1st Vice President, I have continued to actively participate in the monthly Executive Board conference calls where we are reviewing and processing initiatives we would like to support in the near term such as making changes with regards to Board documentation storage and communication, State wide educational offerings, ways to support and grow our membership and how best to facilitate this year's Conference. Now that the bulk of tax season is behind us, hopefully we can turn our focus from discussion and pre-planning to implementation of these initiatives.

Sponsorship Committee Update:

We received our 2020 Rebate in the amount of \$335 from The TaxBook, another strong year! This is in addition to the \$500 (!!!) we received from the subscription they allow us to auction off, the discounts we are to pass along to our membership and the web library subscription made available to the Board. Thank you for supporting and promoting this program. I have signed us up for their 2021 program. Continue promoting and sharing our Promo Code of 252.

I have not yet finalized our 2021 General Sponsorship Program. I am waiting for us to make a decision on which Conference option we are supporting for this year's October Conference. The Conference format has been the primary item of interest for the Sponsors that we have been able to secure in previous years. Please continue to share potential Sponsors with me and/or once I have the final Program documented pass that information along to the various vendors you utilize in your practice.

Sincerely,

Dan Coccia

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2nd Vice President Report

June 5th 2021

Congratulations to all of you for making it through another tax season. Just when I thought I had seen the worst of it in 2020, here was 2021 taking the cake. Every year I would ask myself a few weeks before the deadline how will I make it through to the end. This year it was more will I make it to the end. Still standing strong and very grateful.

With the lengthen tax season, there was not much I was able to achieve. Our plans for having a non CE meeting after tax season had to be changed and we will all need to recharge and start the planning for the remainder of the year. I will be working on the upcoming meetings for the Chapter Presidents and Chapter Reps as well as the CE meetings for the organization.

Sincerely,

Koreen Jervis
Koreen Jervis, EA
2nd V.P. NYSSEA

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NEW YORK STATE SOCIETY OF ENROLLED AGENTS
BOARD OF DIRECTORS MEETING

January 9, 2021

Zoom Teleconference

- Board of Directors Present: Phyllis Jo Kubey, EA President; Daniel Coccia, EA 1st Vice President; Koreen Jervis, EA 2nd Vice President; Vicki Hermann, EA Secretary; Linda Senke, EA Treasurer; Michael Lawrence, EA Immediate Past President; Jeffrey Gentner, EA Executive Director; Lisa Cancellarich, EA Director at Large; James Otton, EA Director at Large; Eve Lansing, EA Director at Large; Karen Bair, EA Director Western; Rodger Alwais EA Director Nassau/Suffolk; Karen Bair, EA Director Western; Michele Eaton, EA Director Metro; Daniel Magrino, EA Director Brooklyn/Queens; Cosimo Borzumate, EA Director Central.
- Absent: Salvatore Candela, EA Director at Large; Linda Twigg, EA Director at Large; Jacquelyn Payne, Director at Large; Mid-Hudson Valley & Lower Hudson Valley no one elected.
- Guests: Victoria McGinn, CPA EA, Kenneth Kohlhof, EA, Henry Grabkowitz, EA.
- Call to Order: The Board Meeting of the New York State Society of Enrolled Agents was called to order at 9:31 AM by President Phyllis Jo Kubey, EA.
- Quorum: Fifteen of Twenty-One Board Members Present.
- Officer's Remarks: Phyllis Jo Kubey, EA President welcomed everyone to the meeting. Phyllis also stated how different 2020 was compared to our Board meeting last January and how proud she was of how our society has handled all the changes. She is also looking forward to being able to keep good things that have happened with our society. Daniel Coccia, EA 1st Vice President thinks we are off to a good start with virtual learning. Koreen Jervis, EA 2nd Vice President stated she thinks that doing things virtual is saving money and she is pleased to be in the 2nd Vice President position. Vicki Hermann, EA Secretary state that she renewed the CE with IRS and that as far as she knew that all CE has been posted. Linda Senke, EA Treasurer stated that all the financials are in good standing.
- Agenda: Agenda and consent agenda approved with the following items removed:

1. Conference Committee Report

Vicki Hermann, EA made a motion that we accept the minutes from October 24, 2020, and October 31, 2020 meetings. The motion was seconded by Michael Lawrence, EA. Motion approved.

Committee Reports:

Michele Eaton, EA made a motion that the motion of June 6, 2020, requiring that Governance place SOPs in Dropbox for Board review be rescinded. No second needed coming from committee. Motion passed with 12 yes and 3 no.

Kenneth Kohlhof, EA presented the Employer/Employee status Report. The Committee recommended changing the title and came up with a Scope of Service.

Kenneth Kohlhof, EA made a motion that we accept the title change and Scope of Service. No second needed coming from committee. Motion passed with 14 yes and 1 abstain.

Michael Lawrence, EA informed us where the NAEA was concerning the Minnesota Legal Defense Fund.

Michele Eaton made a motion that the Executive Committee be authorized to approve up to \$3,000 in additional funding for the NAEA Minnesota Legal Defense Fund. Motion passed.

Unfinished Business:

Phyllis Jo Kubey, EA stated that John Sheeley, EA was giving a free webinar to the Lower Hudson Valley/Mid-Hudson Valley members in hopes to try and restart those chapters.

New Business:

Phyllis Jo Kubey, EA stated that she is making a task force headed by Koreen Jervis, EA to see if live or virtual education is more preferred by our members.

James Otton, EA stated where the Conference Education stands with speakers and is working on topics with the speakers.

Koreen Jervis, EA stated that she has been in contact with the Event Coordinator at Turning Stone.

Koreen Jervis, EA stated that she is usually starting to work on pricing for the Conference but because we are still unsure what is

going to happen between now and October, she was not sure if she should come with pricing for virtual or live.

Unfinished Business: Closing Mid-Hudson Chapter/Lower Hudson Valley Chapter

Adjournment: The meeting adjourned at 11:33 PM.

Respectfully Submitted

Vicki Hermann, EA
Secretary

Next Meeting Saturday, June 5, 2021.

Pending NYSSEA Board Approval

Phyllis Jo Kubey, EA, CFP, *President*
Daniel L Coccia, EA, CMA, *1st Vice-President*
Koreen Jervis EA, *2nd Vice-President*
Lynn Senke, EA, *Treasurer*
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Contact:
Jeffrey R Gentner, EA, *Executive Director*
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Board Report

Meeting: June 5, 2021

Immediate Past President

To the Members of the Board:

Since our last Board meeting, I have participated in all the Executive Committee meetings and have worked as a member of NAEA's Affiliate Counsel, and as all of us have, endured this most recent tax season.

I hope that many of you took advantage of the opportunity to attend the NAEA Board meeting on May 28th.

I would like to know how many members of this Board have received an invitation to the APEX zoom meetings being held June 7th and 8th from 1 to 5 pm, which is invitation only. I would urge everyone attend to get an idea of what NAEA is doing on behalf of its members. I am looking forward to the NYSSEA Ethics presentation.

Respectfully submitted,

Michael E Lawrence, EA

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Report from the Association Administrator

June 5, 2021 NYSSEA Board Meeting (Virtual)

Since the January 2021 Board Meeting, like most of you, I had a very busy tax season! Since this was the most unusual tax season, I spent time making sure to post all the IRS updates and notices to both the Facebook Pages and the web site. There were dozens of notices related to the Economic Impact Payments, Unemployment, the extended tax season, Premium Tax Credits, the new Child Tax Credits and many more.

I have kept in contact with the Conference Education Committee and assisted in setting up the coming Ethics webinar (June 9), featuring Frank Degen, EA, USTCP. Just prior to the filing season, NYSSEA sponsored two very successful webinar events, the Annual Tax Update (212 participants) and NYS Residency Rules (111 participants). I created and emailed several invitations not only to NYSSEA members, but to affiliate leaders of NAEA. NAEA allowed us to advertise the Annual Update webinar in their weekly publications. Many reminders were also sent since registering with ZOOM for these events is critical. Both events received very favorable evaluations and attracted many EAs and non-EAs from around the country. Currently, NAEA is not offering free advertising for our events, but we currently have over 80 registered to attend of June 9 Ethics webinar.

Although I have been acting as the host for these events, I could not do it as successfully if it was not for the willing volunteers (wranglers) that step up each time to assist with the Q&A and comment areas during the webinar. I could not do it without them!

Other Activities

1. Gathered, edited and combined all Board and Committee Reports for the June 2021 Board Meeting
2. Participated in the monthly Executive Board telephone meetings
3. Communicated via telephone or email with various Board Members on activities, concerns and/or procedural clarifications
4. Created and distributed 12 E-Blasts since the January Board Meeting
5. Monitored the NYSSEA Facebook Group and Page and invited members to participate
6. Posted to the NYSSEA Facebook Page and Group 40 times since the January 2021 Board Meeting
7. Set up the June 9 Ethics webinar, including registration and eblast invitations
8. Maintained the "Latest News" area on the website home page
9. Created an online event survey for the virtual CE events and sent survey to attendees
10. Met virtually (monthly) with President Kubey
11. Created new DropBox shared folders for the Executive Committee and Membership

NYSSEA Board Members and Committee Chairs continue to use the **NYSSEA Board – Shared Folder** in **Dropbox**. Currently in the **NYSSEA Board – Shared Folder** you will find the most current Expense Voucher, Event Report Form, Motion Form and the NYSSEA Logos, updated NYSSEA Board Letterhead and a 2020-2021

Board Misc. folder, which contains the 2020-2021 Board Contact Information roster and the 2020-2021 NYSSEA Board Meeting Timeline document. There are also folders containing the most current SOPs and Policies, current Bylaws and Board Packets. I will continue to keep these updated.

REMINDERS:

1. When using any of the documents included in the DropBox, please remember to **DOWNLOAD** the document so that you can edit/change it to meet your needs. When you are finished, be sure to save it to your **DESKTOP** – not back into the DropBox, since this will alter the generic document in the DropBox. This happened twice recently. When preparing your reports for the Board Meeting, **DO NOT** place them into the DropBox. Attach the reports to an email and send them to me.
2. When NYSSEA Chapters elect new officers, please provide me with **ALL** the necessary information to update the website (full name, full address, phone numbers (including FAX, if applicable), elected position and a recent professional photo, if available)
3. As NYSSEA Association Administrator, I created an exclusive email address so that all pertinent correspondence would be centrally located. Please do not use any other email address for me other than: jgentner@nysea.org. I will accept no responsibility for email sent to any other address.

Respectfully submitted,

Jeffrey R. Gentner, EA
Association Administrator
NYSSEA
June 2021

Phyllis Jo Kubey, EA, CFP, *President*
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May 25, 2021

The Membership Committee ordered new certificates and folders to send to new members along with the introduction letter from the President and Membership Chairperson. We now also send along an NYSSEA pin, see attached photos. There are some address issues as we have had a few envelopes returned which coincides with our next issue with National.

There has been a lot of back and forth with National in regard to the current membership list. During the long tax season, I received membership lists that showed many members on the Suspend/Terminated list that were actually paid members. In the next few weeks, the Membership Committee will be reviewing those lists to clean up with list and make sure every one who is an active member is removed from that list. We will also be checking with all members for their correct addresses and email addresses so we can send National a corrected list for them to take care of for us.

Respectfully Submitted,

Lisa L. Cancellarich, EA
Chairperson

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NYSSEA | POWERING AMERICA'S TAX EXPERTS
NEW YORK STATE SOCIETY
OF ENROLLED AGENTS

NYSSEA POWERING AMERICA'S TAX EXPERTS

Good towards one Chapter Meeting

To Grazia Melissa Siano

From Lisa Cancellarich

Date of issue 7/1/21 Value: *Up to 3 CEs*

Authorized by _____

Valid for One Year • nyssea-018

NYSSEA POWERING AMERICA'S TAX EXPERTS

NEW YORK STATE SOCIETY OF ENROLLED AGENTS

Welcome!

As Chairman of the Membership Committee, I would like to welcome you to the NYSSEA and present you with your new membership certificate. I would also like to introduce you to our Society, its members and its structure.

It is possible you joined NAEA and were unaware of NYSSEA. NAEA is, as you know, the national organization and is the **only** association exclusively representing Enrolled Agents throughout the country and overseas. An illustration of NAEA's advocacy is the recent Congressional passage of **Section 420. Clarification of enrolled agent credentials**. The provision permits enrolled agents approved by the IRS to use the designation "enrolled agent," "EA," or "E.A." Other preparer associations do not and will not represent EAs in this manner!

You probably already received a new membership kit explaining the many other NAEA benefits (EA Journal, weekly NAEA E@lert, member tools, etc.) available to you, and I encourage you to visit www.NAEA.org to learn more. But in case you wondered about the extra state affiliate dues, they go to the NYS affiliate, which is one of ~ 40 independent state organizations under the NAEA umbrella. NYSSEA represents EAs in the Empire State just like NAEA does nationally. Some of our legislative achievements are enclosed.

NYSSEA is the 3rd largest affiliate, behind CA and FL in size with ~ 700 members. We are geographically organized into 8 chapters, which are listed on www.NYSSEA.org. Typically, new members join a "home" chapter for contact purposes. But you will find that members attend whatever chapter meeting piques their interest or fits their schedule. The friends and contacts you make at various NYSSEA meetings will be priceless!

Other Website features include an NYSSEA exclusive: The Google Group. Designed for asking the membership tax questions, new members are encouraged to join by following the instructions on the introductory page. More recently we have added a Facebook Page "NYSSEA" which is a closed page and requires admittance to the page. You will be able to connect with other EAs and ask the membership questions through this application as well.

NYSSEA POWERING AMERICA'S TAX EXPERTS

NEW YORK STATE SOCIETY OF ENROLLED AGENTS

CERTIFICATE OF MEMBERSHIP

This is to certify that

Grazia Melissa Siano

Is a member of the

NEW YORK STATE SOCIETY

of

ENROLLED AGENTS

Entitled to all rights and privileges of membership
in the Society Code of Ethics and Continuing Education Requirements

of January 2021 *Phyllis To Kirby EA*
PRESIDENT



Phyllis Jo Kubey, EA, CFP, *President*
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Koreen Jervis EA, *2nd Vice-President*
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2021 CONFERENCE EDUCATION COMMITTEE REPORT

June 2021

To the Members of the NYSSEA Board:

The Conference Education Committee, co-chaired by Emilie Archambeault and Jim Otton, has continued to meet through the spring. We have contracts signed by our six speakers for the 2021 Conference and have mapped out a weekend education schedule from Friday afternoon to Monday noon.

If necessary, we believe that we have the flexibility to offer the same education content in a virtual format.

We plan to introduce three new speakers to the Conference:

Matt Metras EA,

Elizabeth (Beth) Logan EA, and

Andreozzi Bluestein, LLP (2 teams of two attorneys each)

In addition, we are pleased that three of our well-known previous speakers will return:

Frank Degen EA, USTCP,

Sherrill Trovato EA, USTCP and

Henry Grabkowitz EA.

Each instructor will teach two sessions over the weekend, although not back-to-back. We have scheduled the sessions so that the instructors' hotel accommodation needs will not be excessive.

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The Committee will pay each instructor \$300 per hour of instruction. We will also provide overnight accommodation at the Conference venue and will reimburse travel expenses. We have been very mindful of our speakers' travel logistics so as to minimize expenses.

We are proposing the following education schedule (subject to revision):

Friday Afternoon (2 hours)

Matt Metras will present on "Crypto Tax 101" to the full conference.

Saturday Morning (2 or 3 hours)

Frank Degan and Sherrill Trovato will present a joint session to the full audience on "Preparing for an Audit – Tips and Techniques".

Saturday Afternoon (Breakout Sessions) 2 Hours

- 1). Matt Metras will present "Advanced Cryptocurrency Taxation".
- 2). Andreozzi Bluestein will present on "Post COVID - IRS Trends and Developments"

Full Session (1 Hour)

Henry Grabkowitz will present on "NY State Residency".

Sunday Morning (2 or 3 hours)

Frank Degen will present on "Questions from the Field"

Sunday Afternoon (Breakout Sessions) (2 Hours)

- 1). Beth Logan will present on "Employee Stock Options"
- 2). Andreozzi Bluestein will present on "Appeals"

Full Session (2 Hours)

Sherrill Trovato will present on "Ethics". The specific topic TBD.

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Monday Morning (2 Hours)

Beth Logan will present on “Divorce and Taxes”. We would like to provide each attendee a copy of her book on this topic and have a book signing opportunity.

Henry Grabkowitz will present “NY State Update” **(1 Hour)**.

Saturday/Sunday Help Desk

The attorneys from Andreozzi Bluestein have offered to staff the desk and provide assistance to our attendees.

We are currently following up with our speakers for their bios and course descriptions.

Looking ahead to the 2022 Conference, the co-chairs have prepared a list of approximately 12 speakers whom we would like to introduce to the 2022 Education Committee as potential participants at future conferences. Our goal is to attract top quality educators to the NYSSEA membership.

With that same goal in mind, the co-chairs have provided our contact details to Bill Nemeth, the education chair of Georgia Society of Enrolled Agents. Bill plans to build a network of affiliate education chairs to share speaker names and reviews, which I hope will broaden the NYSSEA access to new and interesting education opportunities for our members.

Respectfully submitted,

Jim Otton, EA

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BROOKLYN/QUEENS CHAPTER REPORT
May 26, 2021 Board of Directors Meeting

President: Koreen Jervis, EA
Secretary: Aubrey Chichester, EA
Treasurer: Sofia Sierra, EA
Chapter Rep: Daniel F. Magrino, EA

Once again we have completed a filing season which was extended past what is probably the most famous due date known to every American; April 15th. We are all looking forward to a summer in which our State and Cities continue to open up as we fight back this virus.

As was the case with the last report I submitted to the board, there is not much for me to report. We have all been busy the past 5 and a half months servicing and filing returns for our clients.

What I can tell the board is that the Brooklyn/Queens's chapter plans on resuming its normal activities sometime in the near future. This is contingent on the direction the recovery of our economy takes going forward.

We are also looking forward to once again host, what would be our 8th annual community project with the Make-A-Smile Foundation. We take children from local public schools and assist them in shopping for back to school supplies. We run the event in August at the local Target stores.

With that said as of this date I have very little else to report regarding the Brooklyn/Queens chapter. I hope all the members and their families have stayed safe during what will hopefully be in final months of the Coronavirus pandemic.

Respectively Submitted on May 25, 2021

Daniel F, Magrino, EA
Chapter Representative
Brooklyn-Queens Chapter of the NYSSEA

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Central New York Chapter of New York State Society of Enrolled Agents

Due to COVID-19, the Chapter's Executive /Education Committee has decided to postpone all CPE locally until September 2021.

The Committee recommended to its members that they should take advantage of the CPE provided by other Chapters and/ or NYSSEA.

The committee will continue to meet to review the situation.

Cosimo M Borzumate, EA
Chapter Director

Saturday, May 29, 2021

Members Licensed to Represent Taxpayers before the Internal Revenue Service

Phyllis Jo Kubey, EA, CFP, *President*
Daniel L Coccia, EA, CMA, *1st Vice-President*
Koreen Jervis EA, *2nd Vice-President*
Lynn Senke, 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

NYSSEA – LHV CHAPTER REPORT for June 05, 2021 Board Meeting

VACANT, President
VACANT, Vice-President
VACANT, Treasurer
VACANT, Secretary
VACANT, Chapter Rep

Jacquelyn Payne, EA, Director at Large

The last chapter meeting was May 2019.

There has been no activity since the last report.

Respectfully submitted May 26 2021

Jacquelyn P Payne, EA LHV Director at Large

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NYSSEA Metro Chapter Report to the Board

June 2021

While no chapter education events have been held, we fully support the state-wide NYSSEA virtual offerings and continue to encourage our chapter members to participate. Our hope is to return to in-person meetings as soon as State health regulations will allow. Emilie Archambeault and I have attended other education offerings this Spring with the intention to identify speakers and topics that we believe would bring value to our members.

An informal in-person Metro chapter “Coffee Break” is scheduled for May 27th. We are inviting our members to join us for a discussion on the recent tax season and to exchange ideas on marketing and growing our businesses. There is no set agenda and no CE offered, but we want to maintain the collegiality among our members until we can formally meet again.

Respectfully submitted,

Jim Otton, EA, *on behalf of Michele Eaton, EA*

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Nassau / Suffolk Chapter Representative

Rodger Alwais, EA

Board Meeting June 2021

To the members of the board:

We all look forward to the new normal for 2021!
Whatever that might be.

There is lots to look forward to, but we don't know what it will look like.

Will we get back to in-person meetings – blended with zoom attendees?

Will we get support from other of our chapters, chapters outside of New York? We have participated in seminars put on by other EA States – NJ, VA and others. We have had seminars from other organizations such as Agostino & Associates and others.

There are benefits and downsides to virtual meetings; they are convenient, cost effective, but are impersonal and can be cliquish. You don't get to meet others in our field.

I await instructions from the Government Relations Committee.

Have you taken the opportunity to meet with our sponsors? I do know that ADP's Alfredo Torres will go the extra mile to help you as there are many opportunities where ADP has resources unavailable to us as individuals or small companies. I will continue to find prospects for our Sponsorship Program.

I look forward to assist Koreen Jervis with Conference – as it will feel very different – it has been a while.

Looking to assist with issues that arise from time to time, so that we might better improve NYSSEA.

I am also looking forward to the fine leadership of Phyllis Jo Kubey.

Sincerely,
Rodger Alwais

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New York State Society of Enrolled Agents Western New York Chapter

Activity Report for Presentation at the June 2021 Board meeting

Karen L Bair, Chapter Representative
Dan Coccia, Chapter President
Raechel Taddei, Chapter Secretary

Chapter Meetings:

No meetings have been held since fall 2020 due to tax season.
There are no further events scheduled at this time.

Prepared by Karen Bair, Chapter Representative, May 26, 2021

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22 Hidden Ridge Common, Williamsville, NY 14221

May 25, 2021

The Governance Committee has had no activity since the last board meeting.

Respectfully Submitted,

Michele Eaton, EA and Barbara MacDonald, EA
Co-Chairs, Governance

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25 May 2021

NYSSEA Board Meeting

June 5, 2021

Awards Committee Report

The time has arrived for the process to begin for this current year. I ask Jeff to send out the emails announcing the awards and procedures for nominations.

The Board needs to decide what to do with the 2020 Scholarship that was not awarded. Do we let it drop (there were no entries) or do we offer two for the 2021 season? Please advise the Committee on the Board's decision.

Respectfully submitted,

Judy M Strauss, EA, Chair

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CE Upload Committee Report

May 26, 2021

To the Members of the Board:

Since our last meeting I have gotten a course number for Frank Degen's ethics course in June and have uploaded the CE credits for Frank's January course.

As chair of this committee, I feel it is my duty that I get all the course number for anything that is presented at the state level, and I will be the one to upload the course attendees to the IRS.

Other than this there as not been much activity.

Sincerely,

Vicki Hermann, EA
CE Uploading Chair

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Conference Chair Report

June 5th 2021

With the uncertainties surrounding COVID 19 and our general population not sure if being vaccinated is really going to truly allow us to feel safe again, we are still faced with the uncertainties of planning an in person or a virtual conference. With many establishments opening up and as we see more advertisements from various organizations for in person conference, it make me feel hopeful that we should be planning an in person conference. I believe that since our conference is in October, it gives more time for people to feel comfortable with being in groups again. Many of us are so tired of being indoors and sitting at our computers taking virtual classes that we are ready for some normalcy. While there are many who would prefer the convenience and cost of a virtual event we can certainly try to offer them the opportunity to do so at a later date if we were to record the presentations.

When we did our early bird registration for our conference at Turning Stone, of the 36 people that were registered we have 19 who opted to have their overpayment applied to 2021. There are 8 people that applied their full payment and 11 who applied part to 2020 and the remainder to 2021. We have a total of \$8016 in funds to be applied to 2021. The discussion now has to involve the cost for 2021 and those members that paid \$520 or \$495. Given the confidence and support these members showed in us we need to consider a pricing structure that will keep these members at the same rate we promised them.

I feel very disconnected with the situation with Turning Stone. I cannot being to even understand how I will be proceeding with any planning of this event. I have not had to deal with a third party in the past and there was always direct contact with the establishment and the people I would be working with. I always knew who I could negotiate with and what they were willing to do for us. Hopefully should we be moving forward, this will change and I can feel more comfortable in any arrangements we make in our planning. I am looking forward to a grEAt conference in person or virtual.

Sincerely,

Koreen Jervis

Koreen Jervis, EA
Conference Chair

Daniel Coccia, EA

Rodger Alwais, EA

Norman Shaiman, EA

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