North Carolina Society of Enrolled Agents

Presents

An Exceptional Fall Education Event

September 18 – 19, 2025 (Thursday and Friday)
Embassy Suites Hotel - Greensboro Airport, Greensboro, NC

We're excited to welcome Keith Wood, Sara Maddox,
Robert Nordlander, C. Steven Boon and Beanna Whitlock!!!

Thursday, September 18, 2025: 7-8 a.m. Registration/Sign-in – Session begins at 7:55 a.m.

- **Recent Developments in Federal Income Tax Case Law 2025 – Keith A. Wood, Attorney, CPA** (1 hour)
- **Tax Considerations and Valuations in Gift, Estate and Income Tax Reporting** – **Sara Maddox, ABV, AM, CVA, EA** (1 hour)
- **Erase the Penalty: Best Practices in Abatement* Robert Nordlander, CPA, CFE, EA** with **C. Steven Boon, EA** (2 hours)
- **Forensic Accounting: Court Approved Methods of Proof – Robert Nordlander, CPA, CFE, EA** with **C. Steven Boon, EA** (4 hours)

***NCDOR representatives will be unable to present at our Fall CE event. Robert Nordlander, CPA, CFE, EA and C. Steven Boon have graciously agreed to present this topic in their place.**

Friday, September 19, 2025 7-8 a.m. Registration/Sign-in - Session begins at 7:55 am.

- **Ask Beanna – Beanna J. Whitlock, EA** (1 hour)
- **One Big Beautiful Bill Act – Beanna J. Whitlock, EA** (3 hours)
- **Choice of Entity/Sale of a Business - Beanna J. Whitlock, EA** (2 hours)
- **Again, the Casualty Loss** - **Beanna J. Whitlock, EA** (2 hours)

Please scroll down for complete course descriptions and speaker biographies. Topics, speakers, and times are subject to change without notice. Updated information will be provided at ncseaonline.com.

The Askew Foundation, Inc. is offering a scholarship to attend NCSEA's 2025 Fall CE Event. On ncseaoline.com, click the Askew Foundation Tab on the menu to access the scholarship announcement and an application.

Cost of seminar includes lunch, snacks and drinks each day.

NCSEA Member Cost:	**Register by August 31, 2025 $450**	**Register after August 31, 2025 $550**
Non-NCSEA Member Cost:	**Register by August 31, 2025 $550**	**Register after August 31, 2025 $650**

******Paid registrants of the seminar will be provided access to a downloadable copy of the material in advance of the seminar dates. Hard copies of the book will not be provided.***

Those registering on or before August 14, 2025, will receive a link to a free audiobook by Robert Nordlander, CPA, CFE, EA. See Robert Nordlander's biography below for more information.

Space is limited! Register online today at www.ncseaonline.com!

CE Continuing Education
Approved IRS Provider

North Carolina Society of Enrolled Agents

2025 Fall Education Event Registration Form

When: Classes begin Thursday, September 18, 2025 at 7:55 am & end Friday, September 19, 2025 at 4:20 pm. Registration/Sign-in each day is from 7:00 a.m. to 8:00 a.m.

Where: Embassy Suites Hotel - Greensboro Airport, 204 Centreport Drive, Greensboro, NC 27409

Accommodations – Embassy Suites Hotel - Greensboro Airport, 204 Centreport Drive, Greensboro, NC 27409

Nightly Room Rate: **$142.00 per standard room per night** - Special rate applies to overnight stays on 9/17 & 9/18. This favorable rate is available until **August 30, 2025.** or until our block of rooms is filled, **whichever occurs first. Book your room early!!**

Reservations: Call 1-800-Embassy or (336) 668-4535 and **mention NCSEA.** To **book online**, use this Direct Link: **Embassy Suites Greensboro**

Directions: **http://www.embassysuitesgreensboro.com, then click on "maps."**

Early Bird Special: Register for CE by **August 14, 2025** to be entered in a drawing for a chance to receive a $100 gift certificate towards a future NCSEA CE event (certificate valid for 2 years). You will also receive a link to a free audiobook by Robert Nordlander, CPA, CFE, EA. See details in Mr. Nordlander's biography.

Name: ____ EA___ CPA___JD___ AFSP Participant___
(Name as it appears on your PTIN registration card)
PTIN: _________________ (P followed by 8 digits.) For IRS CE credits, you must provide your correct and complete PTIN.)
Address: ____City____________State______Zip_______
Telephone Number: _________________ Email: ____

Exclusive Offer for Attending NCSEA Members: Enhance the skills of your employees. Bring non-member employees with you for member price. To receive this discount, you must register and attend the event with your employees. Please provide non-member Employee Name(s), PTINs and email addresses on a separate sheet of paper if you are unable to register online.

Participant	Register by August 31, 2025	Register after August 31, 2025	*Your Cost*
NCSEA Member or Associate:	$450.00	$550.00	_______
NCSEA Member's Non-member Employee:	$450.00 x ____	$550.00 x ____	_______
Non-NCSEA Member or Associate	$550.00	$650.00	_______
		Total Cost	_______

**A downloadable PDF of the material will be forwarded to each paid registrant prior to the meeting. Each registrant is responsible for printing the material and/or bringing a digital copy with them to the meeting. NCSEA will not have books available for purchase at the meeting. Note that registration is not complete until NCSEA receives payment for the seminar. No refunds will be granted after materials are sent.

We request that all participants register online. This will ensure that we have the correct information in our database including your PTIN. Once you register and make payment online, you will receive confirmation emails and a receipt. Non-members can use the non-member link on the website. Members must **sign in** to obtain their discount. If you have forgotten your password, click the "**Forgot password**" link, enter the email that NCSEA has on file, and you will be directed to setup a new password. For security reasons, we do not have access to any member's password.

You may also pay by **check or credit card**.
- Check – Send a check payable to "NCSEA" with your registration form to the address below.
- Credit card - Complete the information below to scan and email registration form to admin@ncseaonline.com.
(Be wary of privacy concerns if you choose to email.)

VISA _____ MasterCard _____ Discover _____ American Express _____ Expiration: __ __/__ __ __ __

Card #: ____ Card Security #: _________ ________

Name as it appears on card:______________________________Signature:______________________________

Please mail your payment and registration form to:
or register & pay online at **www.ncseaonline.com**.
You must **log in to register and pay online.**
Refund Policy: For a full refund, all cancellations must be sent to Candace Cansler in writing by October 6, 2024.

North Carolina Society of Enrolled Agents
% Candace Cansler, NCSEA Administrator
P.O. Box 937
Conover, NC 28613
Email: admin@ncseaonline.com

2025 Fall CE Event

Speaker Biographies

KEITH WOOD, CPA, JD, an attorney with Carruthers & Roth, PA, in Greensboro, NC, is certified by the North Carolina State Bar as a Board Certified Specialist in Estate Planning and Probate Law. Keith's practice areas include tax planning and representation of clients before the Internal Revenue Service and North Carolina Department of Revenue, corporate law and business transactions, and estate planning. Keith's practice is focused on business, tax and estate planning for a wide range of clients, including new startups, entrepreneurs and multigenerational family-owned businesses. He counsels these closely held enterprises in the unique challenges they face – from succession planning, tax planning and management structures to effective compensation strategies.

Keith is a Certified Public Accountant and is an active member of the North Carolina Association of Certified Public Accountants and a former member of its Board of Directors. Recognized by the NCACPA with multiple Outstanding Presenter Awards, Keith frequently speaks to civic and professional groups on business planning, taxation, business succession, and estate planning and has authored published articles on these topics.

Keith previously served as chair of the Tax Section Council of the North Carolina Bar Association.

Keith received his undergraduate degree in Business Administration and his law degree, with honors, from the University of North Carolina. While in law school, Keith served as the Business Manager of the *North Carolina Journal of International Law and Commercial Regulation.*

Contact information: Keith A. Wood, Attorney, CPA
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Sara Maddox, ABV, AM, CVA, EA, is a Senior Manager in Business Valuations at DMJPS CPAs + Advisors. Her work includes valuing business enterprises using fundamental and complex analysis for purposes of succession planning, gift and estate tax, mergers & acquisitions, litigation matters, and shareholder buyouts. She works with a variety of industries, including retail/wholesale, real estate and construction, professional and personal services, and manufacturing.

Prior to DMJPS, Sara worked in a public accounting firm providing valuation reports for a variety of industries. She has also assisted small business owners and individuals with advisory, accounting, and tax services. Sara is an active seeker of current trends and new theories in the valuation field.

In 2024, Sara received the AICPA Standing Ovation Award. This award recognizes young finance professionals who exhibit exemplary professional achievement in the areas of forensic accounting and business valuation. She also received the 2024 Alumni Achievement Award from the Miller College of Business at Ball State University.

Sara currently serves on the Board of North Carolina Society of Enrolled Agents (NCSEA) and is a member of National Association of Enrolled Agents (NAEA), American Institute of Certified Public Accountants (AICPA), National Association of Certified Valuators and Analysts (NACVA), American Society of Appraisers (ASA), and Financial Consulting Group (FCG). She is the Treasurer of the Asheville Tennis Association and a SOAR Mentor and Alumni Ambassador for Ball State University, where she graduated with a double major in Finance & Risk Management & Insurance and a minor in Economics. Sara has authored several articles for DMJPS PLLC's blog and has presented for professional organizations.

In her spare time, Sara enjoys reading, spending time outdoors with her border collie, playing tennis, and performing with the brass choir at Central United Methodist Church.

Contact information: Sara Maddox, ABV, AM, CVA, EA
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Robert Nordlander, CPA, CFE, EA was a special agent with IRS-Criminal Investigation for over 20 years, where he investigated tax and money laundering crimes around the world. He is a nationally recognized speaker and expert on forensic accounting and tax resolution.

As part of his duties with the IRS, he taught continuing education to other federal employees, including representing the United States in training foreign law enforcement in forensic accounting and anti-money laundering investigations.

Robert has a Bachelor of Science degree in Accounting, a MBA degree, a CFE certification, and an Enrolled Agent designation. He is the owner of Nordlander CPA, PLLC, a boutique forensic accounting and tax resolution firm outside of Greensboro, NC.

He currently is the host of the Fraud Fighter Podcast, which is focused on the forensic accounting and anti-fraud/anti-money laundering industry. He resides in NC and has an interest in long distance running (albeit slow), good BBQ, and the FIRE movement.

Robert has spoken at the NCACPA, AICPA, NATP, Woodard, Thomson Reuters, and other state CPA associations, and has authored four (4) Amazon bestsellers:

- *Criminal Tax Secrets: What Every Defense Attorney Should Know – An Insider's Guide to Evaluating Every Stage of a Criminal Tax Investigation*
- *Unpaid Payroll Taxes: A Time Bomb You Can Defuse*
- *Erase the Penalty: A Tax Professional's Guide to Abatement*
- *Expert to Author: Turning Insight into Influence – Write, Publish, and Share the Book that Matters*.

Amazon: https://www.amazon.com/stores/Robert-Nordlander/author/B0BMZT4CNK

Robert will have his books available for sale at NCSEA's Fall CE Event.

Attendees registering on or before August 14, 2025, will receive a link to a free audiobook by Robert Nordlander, CPA, CFE, EA. The link will be on the receipt registrants will get upon confirmation of payment.

Contact Information: Robert Nordlander, CPA, CFE
NORDLANDER CPA, PLLC
4004 Ballard Farm Road, Colfax, NC 27235
Mobile: (336)421-2392 robert@nordlandercpa.com
www.nordlandercpa.com Calendar for appointment

C. Steven Boon, EA, will be assisting Robert Nordlander. Mr. Boon is a writer, consultant, and Enrolled Agent based in the Greensboro-area of North Carolina. His firm Boon Tax Group LLC specializes in resolving IRS disputes for clients. He holds a BS in Accounting as well as an MBA from the University of Tennessee at Chattanooga and a Master of Divinity from Southeastern Baptist Theological Seminary.

Steven is a former special agent with IRS Criminal Investigation with nearly two decades of experience in income tax cases. In Criminal Investigation, Steven had a wide range of experiences working with the various IRS operating divisions, which he credits for giving him insight into the agency's inner workings and workplace culture. He leverages this knowledge to help his clients navigate their tax issues effectively.

Steven is co-author of the Amazon Best Seller *Erase the Penalty: A Tax Professional's Guide to Abatement*.

Outside of work, Steven enjoys spending time with his family, exploring North Carolina, and volunteering his time with his church and ministering to senior adults in an assisted living center.

Contact Information: C. Steven Boon, EA
Boon Tax Group LLC
203 E. Main St. #472
Jamestown, NC 27282
Boon.tax

Beanna J. Whitlock, EA is an Enrolled Agent in private practice as Whitlock Tax Service, LLC located in Canyon Lake, TX.

A tax law instructor for more than 40 years with emphasis on Limited Liability Company and Ethics and Professional Conduct presentations, Beanna has taught tax professionals across the country and is an adjunct professor for Auburn University. She is the Executive Director of Tax Pro Fellowship, a web based organization providing educational resources and practice management tools at www.taxprofellowship.com

She has testified before Congress, Treasury and the IRS Oversight Board. She has served on the IRS Information Reporting Program Advisory Council as well as the IRS Commissioner's Advisory Committee (CAG). She served as the IRS Director of National Public Liaison for Commissioner Mark Everson and is a recipient of the Commissioner's Award for Excellence of Service.

She has been honored by Accounting Today as one of the 100 Most Influential in Accounting for an unprecedented 7 years.

Known for her fierce defense of the tax professional community, Beanna is frequently consulted by accounting and tax publications regarding issues concerning the tax professional community.

She is the 2013 Member of the Year of the California Society of Tax Professionals.

Honored by the National Conference of CPA Practitioners in 2015 for her contribution to Excellence in Education, "Beanna serves the tax professional community as an inspired calling."

Contact information: Beanna J. Whitlock, EA
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Approved courses for Fall 2025 Education Event

The following programs have been approved for IRS Continuing Education Credits for Enrolled Agents and Other Tax Return Preparers. Other than for EAs and ERPAs, the IRS currently does NOT require continuing education or mandatory testing for any other tax return preparer or PTIN holder (non-EAs). Participation in these programs is voluntary for Other Tax Return Preparers (OTRPs). Continuing education credits will be posted to PTIN accounts for any participants who provide their complete and correct PTINs, regardless of credentials. To ensure that your continuing education credits appear correctly in your PTIN account, please provide your PTIN and name as they appear in your PTIN account upon registration. It is your responsibility to provide the correct information. Reminder: CE providers are not required to submit program data to the IRS in real time, so your credits may appear in your PTIN account on a delay.

While all attendees receive a Certificate of Completion, CE credits will only be uploaded for those who provide a complete and correct PTIN. Attendees may earn up to 13 hours of IRS Federal Tax Law CE and 3 hours of Federal Tax Law Update. Note that topics have changed as of August 6, 2025. NCDOR will not be able to present. We have replaced the NCDOR program with Erase the Penalty: Best Practices for Abatement.

In accordance with the standards set forth in Circular 230, section 10.6, CE credits will be granted based on a 50-minute hour. CPAs, Attorneys, and other professionals should check with their licensing state boards or organizations to determine if credit applies for their continuing professional education or continuing legal education. NCSEA is not a registered provider of NASBA courses.

Recent Developments in Federal Income Tax Case Law 2025 **Keith Wood, CPA, JD**
1 hour IRS CE Federal Tax Law Topics/Federal Tax-Related Matters

This live group instructor-led presentation will focus on some of the more interesting or important federal income tax developments that have transpired over the last year or so. The new developments addressed in this presentation will include numerous tax court cases, decisions of various federal circuit courts, as well as IRS pronouncements, revenue rulings and regulatory changes. The attendee will be able to recognize how these developments will affect representation cases and preparation of tax returns.

Tax Considerations and Valuations for Gift, Estate and Income Tax Reporting
Sara Maddox, ABV, AM, CVA, EA 1 hour IRS CE Federal Tax Law Topics/Federal Tax-Related Matters

In this live in-person presentation, the speaker will cover IRS requirements and regulations surrounding valuations and appraisals in gift, estate and income tax reporting. The speaker will examine adequate disclosure, qualified appraiser/appraisals, and pertinent revenue rulings in addition to offering some tax court case discussion. The attendee will learn what qualifies as adequate disclosure and be able to recognize who is a qualified appraiser and what constitutes a qualified appraisal. The attendee will also understand the impact of the revenue rulings and tax court cases on gift, estate and income tax reporting.

Erase the Penalty: Best Practices in Abatement **Robert Nordlander, CPA, CFE, EA**
With Steve Boon, EA 2 hours IRS CE Federal Tax Law Topics/Federal Tax-Related Matters

It's automatic that when a taxpayer receives a tax notice, the tax due will have penalties added. When the client gives you the IRS notice, do you know if that penalty can be removed and how? This course will show you how to evaluate the penalty, devise a plan to remove it, and possibly appeal the IRS decision if you don't get it removed.

The major topics covered in this class include:

- The authority of IRS in assessing tax penalties;
- The types of penalties that can be removed;
- The process the IRS uses to evaluate penalty abatements;
- How to request penalty abatements; and
- Best practices in asking for penalty abatement, including use appeals.

After attending this live-group, instructor-led presentation, you will be able to...

- Identify the authority of the IRS to assess penalties;
- Recognize the common types of penalties that can be abated; and
- Develop a plan to request penalty abatement.

The instructor will review real examples of successful penalty abatements.

Forensic Accounting: Court Approved Methods of Proof **Robert Nordlander, CPA, CFE, EA**
With Steve Boon, EA 4 hours IRS CE Federal Tax Law Topics/Federal Tax-Related Matters

How does a forensic accountant calculate financial losses? Chapter 9.5.9 of the IRM contains Methods of Proof special agents use in Criminal Investigations. Federal courts have approved various ways to calculate losses ranging from the net worth method of proof to the expenditures method. In this live in-person presentation, the speaker focuses on various court approved methods of proof, when to use them, and how to calculate the total loss.

Major topics covered include:

- The role of methods of proof in investigations;
- Various types of methods of proof approved by the courts;
- Weaknesses and strengths of the methods of proof;
- The formulas in calculating methods of proof; and
- Applying the formulas in various circumstances.

Attendees will be able to

- Identify the various court approved methods of proof;
- Recognize court cases approving the methods of proof;
- Calculate the different methods of proof; and
- Using given facts, choose the appropriate method of proof.

This course is highly beneficial for Enrolled Agents offering tax representation/resolution services, tax return preparers, CPAs, and forensic accountants. Note that NCSEA is only registered as an IRS CE provider. CPAs, attorneys, forensic accountants and other professionals should check with their licensing boards to determine if credit applies for their continuing professional education or continuing legal education.

Ask Beanna **Beanna J. Whitlock, EA**
1 hour IRS CE Federal Tax Law Topics/Federal Tax-Related Matters

Bring your tax questions to the conference. Beanna will respond, discuss the tax issue and determine the best resolution. Questions should focus on federal income tax issues and should be submitted before the session. Live group, in-person presentation.

One Big Beautiful Bill Act **Beanna J. Whitlock, EA**
3 hours IRS CE Federal Tax Law Update

This instructor-led presentation recaps the One Big Beautiful Bill Act signed into law on July 4, 2025. Topics covered include the extension and enhancements of certain TCJA provisions such as tax rates, child tax credit, other dependent credit, SALT limitation, Estate and Gift Tax exclusion, casualty losses, QBID, and the qualified residence interest deduction limitation. The speaker will discuss the "No Tax" provisions affecting Social Security income, car loan interest, tips, and overtime. Trump accounts, Premium Tax Credit eligibility and payback provisions, charitable deductions, educator expenses, gambling losses, FMLA payments, child and dependent care credits, and the elimination of energy credits along with a myriad of other provisions in the 886-page Act are covered in the material. Live group in-person presentation..

Choice of Entity/Sale of a Business **Beanna J. Whitlock, EA**
2 hours IRS CE Federal Tax Law Topics/Federal Tax-Related Matters

Knowing which entity choice to make for business operations may not always be obvious. In this live group presentation, the instructor addresses the advantages, pitfalls and tax consequences of entity choices: sole proprietor, partnership, corporation, Scorporation. The speaker addresses the concerns, issues and tax implications of operating the entity and what happens when there is a subsequent sale of the interest in the business entity. Upon completion of this course, attendees should understand what information to provide business owners so they can make the best entity choice that will accomplish their goals while being compliant with regulations. Participants will understand how to report the sale or termination of a sole proprietorship, a partner's interest in a partnership, and a shareholder's interest or stock in a corporation or S-corporation. Businesses that live eventually die – owners and preparers should be prepared. Live-group in-person presentation.

Again, the Casualty Loss **Beanna J. Whitlock, EA**
2 hour IRS CE Federal Tax Law Topics/Federal Tax-Related Matters

In this live, in-person presentation, the instructor focuses on Disaster, Casualty and Theft Losses. Upon completing this course, participants will understand the requirements to deduct losses established by the Tax Cuts and Jobs Act of 2018. They will be able to recognize the difference between a casualty loss and a qualified casualty loss. They will understand that a casualty may create a gain, and they will be able to identify steps to take to avoid reporting the gain.

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Please note that no video or audio recordings of the sessions are allowed. This includes the use of AI and any AI notetakers. Also, NO photographs are to be taken during the event without the express written permission of the speakers and NCSEA. Please refer to NCSEA's policy on recording CE events.

Please check regularly for any updates to this list. Presentations covering state tax issues (i.e., NCDOR presentations) do **NOT** qualify for IRS CE. Attendees can earn up to 13 hours IRS Federal Tax Law Topics/Federal Tax-Related Matters CE and 3 hours of IRS Federal Tax Law Update CE. Topics and speakers are subject to change. Note that this agenda has been changed as of August 6, 2025, and replaces the originally scheduled NCDOR presentation with Erase the Penalty: Best Practices in Abatement.