North Carolina Society of Enrolled Agents

Presents

An Exceptional Fall Education Event

September 22 – 23, 2026 (Tuesday and Wednesday)
Embassy Suites Hotel - Greensboro Airport, Greensboro, NC

We're excited to welcome Keith Wood, Jim Buttonow, Dave McGuire, and Beanna Whitlock!!!

Tuesday, September 22, 2026: 7-8 a.m. Registration/Sign-in – Session begins at 7:55 a.m.

- **Recent Developments in Federal Income Tax Case Law 2026** – **Keith A. Wood, Attorney, CPA** (1 hour)
- **The IRS Goes Digital: Working with IRS Online Tools** – **Jim Buttonow, CPA/CITP** (1 hour)
- **Cost Segregation and Other Depreciation Issues one year after OBBBA** – **Dave McGuire** (2 hours)
- **Why You Don't Do Business with Relatives** - **Beanna J. Whitlock, EA** (2 hours)
- **What to Do When a Client Dies** - **Beanna J. Whitlock, EA** (2 hours)

Wednesday,September 23, 2026 7-8 a.m. Registration/Sign-in - Session begins at 7:55 am.

- **OBBBA – 2026 and Future Years** – **Beanna J. Whitlock, EA** (2 hours)
- **Tax Oddities** – **Beanna J. Whitlock, EA** (2 hours)
- **The Practical Comprehensive IRS Offer in Compromise Workshop** - **Jim Buttonow, CPA/CITP** (4 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 2026 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, 2026 $450**	**Register after August 31, 2026 $550**
Non-NCSEA Member Cost:	**Register by August 31, 2026 $550**	**Register after August 31, 2026 $650**

Vendor/Exhibitor Costs **1 person at table $450** **Additional person at table $150**

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.

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

North Carolina Society of Enrolled Agents

2026 Fall Education Event Information

When: Classes begin Tuesday, September 22, 2026 at 7:55 am & end Wednesday, September 23, 2026 at 4:30 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: **$143.00 per standard room per night** - Special rate applies to overnight stays on 9/21 & 9/22. This favorable rate is available until **August 24, 2026.** or until our block of rooms is filled, **whichever occurs first. Book your room early!! Rooms are expected to fill up fast.**

Reservations: To **book online**, use this Direct Link: **Embassy Suites Greensboro**

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

Early Bird Special: Register for the 2026 Fall Education Event by **August 14, 2026** to be entered in a drawing for a chance to receive a $100 gift certificate towards a future NCSEA CE event. The certificate is valid for 2 years).

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, 2026	**Register after** August 31, 2026
NCSEA Member or Associate:	$450.00	$550.00
NCSEA Member's Non-member Employee:	$450.00	$550.00
Non-NCSEA Member or Associate	$550.00	$650.00

Vendor/Exhibitor Costs **1 person at table $450** **Additional person at table $150**

**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. Be sure to enter a complete and correct PTIN for CE credits (P+8 digits). 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. NCSEA 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.

For help registering online, please contact Candace Cansler at ncseaonline8300@gmail.com.

2026 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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Jim Buttonow, CPA/CITP is the Managing Principal of JL Buttonow, CPA, PLLC. Jim has over 37 years experience in tax and accounting. Jim's specialty is IRS Practice and Procedure – more commonly referred to as a tax problems, IRS controversy, or tax disputes.

His extensive knowledge, shared in numerous publications, led to his being voted to Accounting Today's Top 100 Most Influential People for two years. Jim has helped thousands of taxpayers and the largest firms and tax preparation companies in the world. Jim was the chief architect and inventor of the post-filing tax controversy software, Beyond415, that is used by tax giants such as Thomson Reuters and H&R Block to help their clients with tax problems. Jim has also provided strategic leadership to numerous other tax firms and financial service providers, including Jackson Hewitt Tax Services, to enable them to work better with the IRS.

Jim's book, The Tax Problems and Solutions Handbook, is published by Commerce Clearing House (CCH) tax research division and has sold thousand of copies. The Handbook provides tax professionals practical solutions to the most common tax problems facing their clients. Thousands of tax professionals use his book everyday, along with his webinars, to resolve their clients' IRS issues.

Jim and his team provide tax controversy consultation and representation services to both tax clients and tax firms.

Contact information: Jim Buttonow, CPA/CITP
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David McGuire is a leading expert on cost segregation, fixed assets and depreciation law and a co-founder of McGuire Sponsel. He has reviewed real estate portfolios ranging in size from six-figure acquisition costs to billions of dollars in value and has provided cost segregation services for companies in a wide variety of industries.

While serving in consulting and management roles with Big Four accounting firms, he acquired a thorough understanding of the Internal Revenue Code's depreciation provisions. He has also shared his expertise in depreciation techniques and practices through speaking engagements and workshops for industry groups and accounting firms, including the American Bar Association and multiple CPA Real Estate groups.

McGuire continues to grow McGuire Sponsel's national presence in cost segregation and depreciation. He is the primary resource for alliance firms in regards to how tax law affects depreciation. His knowledge in determining asset costs and classifications has held up against IRS scrutiny and has built the firm into a trusted industry resource. McGuire's expertise in depreciation extends beyond the engineering portion of a study. He is often called on to consult in other areas including bonus depreciation and the effects of depreciation on complex transactions, such as Step Up in Basis, Section 108, and Passive Loss Limitations.

McGuire is a recognized expert in areas such as 179D and Alternative Energy Tax Credit Consulting.
McGuire earned a degree in civil engineering from the University of Notre Dame with a concentration in structural design.

Contact information: Dave McGuire
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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 2026 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 12 hours of IRS Federal Tax Law/Federal Tax-Related Matters CE and 4 hours of Federal Tax Law Update CE.

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.

Topics, speakers, and times are subject to change without notice. Updated information will be provided at ncseaonline.com.

Recent Developments in Federal Income Tax Case Law 2026 **Keith Wood, CPA, JD**
1 hour IRS CE Federal Tax Law Topics/Federal Tax-Related Matters

In this updated discussion, the instructor 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 significant tax court cases, decisions of various federal circuit courts, as well as IRS pronouncements, revenue rulings and regulatory changes. The instructor leads this live group by highlighting the most interesting developments that may affect how practitioners handle representation cases and how preparers treat certain items on returns.

The IRS Goes Digital: Working with IRS Online Tools **Jim Buttonow, CPA/CITP**
1 hour IRS CE Federal Tax Law Topics/Federal Tax-Related Matters

The IRS is pivoted to a digital first service strategy since 2022. To that end, the IRS is developing more and more digital tools. However, many taxpayers, and their tax pros, are not aware of the online options when working with the IRS. In this course, you will discover the many practical ways taxpayers and tax pros can work with the IRS online using the many tools offered by the IRS. Tax pros will be able to save time by adopting new IRS online features and effectively using IRS transcripts to answer client questions and solve common issues. Tax firms can be proactive in using IRS tools and transcripts in resolving IRS issues. In this webinar, you will learn one strategy to help your firm be more proactive in obtaining IRS account information and addressing client IRS issues.

Cost Segregation and Other Depreciation Issues one year after OBBBA **Dave McGuire**
2 hours IRS CE Federal Tax Law Update

The One Big Beautiful Bill updated and changed depreciation rules. From the increase to bonus depreciation, the introduction of Qualified Production Property, to the changes to 163(j), the changes in this bill have wide reaching effects on how property is depreciated. In this session we will discuss these changes and how they affect not only depreciation but also Cost Segregation and other areas. We will also discuss how to recognize opportunities and debunk some popular cost segregation misinformation appearing on social media. Attendees should expect to receive an update on depreciation rules post OBBBA; an overview of QPP and other OBBBA changes; an understanding of Cost Segregation, and how to recognize opportunities; and an overview of some common misconceptions regarding depreciation fueled by social media.

Why You Don't Do Business with Relatives **Beanna J. Whitlock, EA**
2 hours IRS CE Federal Tax Law Topics/Federal Tax-Related Matters

This live, in-person presentation covers tax law provisions requiring special treatment when conducting business or sales transactions with relatives. The instructor defines who qualifies as a relative for tax purposes and includes a discussion of applicable transactions, proper tax treatment, case studies, and practical questions practitioners should ask when handling these tax situations.

What to Do When a Client Dies **Beanna J. Whitlock, EA**
2 hours IRS CE Federal Tax Law Topics/Federal Tax-Related Matters

This presentation reviews the tax advisor's role when a client passes away, discusses where tax responsibilities intersect with legal matters, and provides guidance on how practitioners can assist surviving family members. The instructor includes a section on "What If the Deceased Is You?" addressing estate closure, IRS relationships (EA, PTIN, EFIN), and succession planning for a tax practice. Live, in-person.

OBBBA – 2026 and Future Years **Beanna J. Whitlock, EA**
2 hours IRS CE Federal Tax Law Update

The instructor in this live, in-person presentation examines tax law changes from the One Big Beautiful Bill Act affecting 2026 and beyond. It describes planning opportunities and strategies to help taxpayers while demonstrating the value of professional tax advice.

Tax Oddities **Beanna J. Whitlock, EA**
2 hours IRS CE Federal Tax Law Topics/Federal Tax-Related Matters

A review of unusual and unique tax situations practitioners encounter. Designed to be both educational and engaging, the instructor provides practical examples and thought-provoking discussions for these unusual circumstances.

The Practical Comprehensive IRS Offer in Compromise Workshop **Jim Buttonow, CPA/CITP**
4 hours IRS CE Federal Tax Law Topics/Federal Tax-Related Matters

There are approximately over 26 million taxpayers (individual and business) who owe the IRS back taxes. In 2025, only 5,464 taxpayers received an IRS settlement – that is, an IRS offer in compromise. An OIC allows taxpayers to settle their tax bill for less than the amount owed. Why do so few get an OIC?
In this live, in-person presentation, find out how the IRS' offer in compromise program works and understand if your financially distressed client qualifies for an OIC, and if it is the best collection alternative for their circumstances. If they qualify, find out how much it will cost to settle their tax bill. We will cover the OIC rules and walk through a real-life individual and business example of how the OIC works from qualification to application, through the OIC investigation, and to the final end. We will also get insights as to why many taxpayers do not qualify – and other IRS options that may be more suited to their circumstances.

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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.