



**North Carolina Society
&
South Carolina Society
of Enrolled Agents
announce**

**THE 19th ANNUAL
CAROLINA CONNECTION
2024 CONVENTION and
CE SEMINAR**

When: May 23rd to May 24th, 2024

Where: *Hotel Ballast Wilmington, Wilmington, NC*

Why: Earn 16 hours of the best Continuing Education

Network with tax pros from east to west.
Win great items at our Raffle Fundraiser.
Earn up to 16 hours of Continuing Education.
Registration cost includes breaks and lunch
on each day of the seminar.

First Day, Thursday, May 23

With **Allan "A.J." Reynolds**

IRS Penalty Abatement - Reasonable Cause & Removal of Penalties
Representation and Client Notices with Case Examples
Collections, Installment Agreements, and Offers in Compromise
Independent Contractor vs. Employee with Volunteer Classification Settlement
Program (VCSP)

Second Day, May 24

With **Beanna J. Whitlock, EA**

Small Business Issues
IRC 754 Election
706 Portability
1031 Exchanges
Minister Taxation

**For detailed information on topics, please scroll down to the
bottom of the online brochure.**

Topics and speakers are subject to change.

Registration, payment forms, and hotel information available
online at www.ncseaonline.com and www.scsea.org.

CAROLINA EAs Re-CONNECT PROGRAM & SCHEDULE

Thursday, May 23, 2024 Tentative schedule

7:00am – 8:00am	Registration
8:00am – 11:50am	Classes (<i>with appropriate breaks</i>)
11:50am – 12:50pm	Lunch
12:50pm – 1:50pm	NC and SC Annual Meetings
1:50pm – 5:30pm	Classes (<i>with appropriate breaks</i>)

*Please use this evening to enjoy and explore
beautiful Wilmington, NC, at your leisure or network with your fellow Eas.*

Friday, May 24, 2024 Tentative schedule

8:00am – 11:50am	Classes (<i>with appropriate breaks</i>)
11:50am – 12:50pm	Lunch
12:50pm -- 4:30pm	Classes (<i>with appropriate breaks</i>)

***Participate in our RAFFLE on Thursday and Friday!!
A GREAT SOCIETY FUNDRAISER!
Lots of fun and lots of bargains!***

Schedules are subject to change to accommodate speakers and announcements.

The [Askew Foundation, Inc.](#) is offering a scholarship to attend the 2024 Carolina Connection CE Event. Look under Askew Foundation Awards www.ncseaconline.com for information and to access an application.

ACCOMMODATIONS

**[Hotel Ballast Wilmington, Wilmington, NC,](#)
301 North Water Street, Wilmington, NC 28401 910-763-5900**

Nightly Room Rate: \$209.00 Historic View \$234.00 River View

This special rate applies for nights of May 21 through May 24, 2024, and is available until **April 22nd** or **until our block of rooms is filled**, whichever comes first. Access the [direct link here](#) to make your room reservations online or call 910-763-5900 and reference NC Society of Enrolled Agents.

Tucked between the Cape Fear River and the Atlantic Ocean, Wilmington is a vibrant, progressive city defined as much by its past as it is by its present. Here, horse-drawn carriages and historic homes coexist in perfect harmony with modern hotels and movie studios. In fact, thanks to the sprawling EUE/Screen Gem Studios, the largest TV and movie production facility outside of California, Wilmington is nicknamed Hollywood East. No trip here is complete without exploring its 230-block National Register Historic District, strolling the scenic Riverwalk, and climbing aboard the USS North Carolina, a WWII battleship.

Separate Tracks are not being offered this year. Representation Topics will be covered on Day 1 of the event and Tax Topics will be covered on Day 2.

Representation Topics with *Allan “A.J.” Reynolds, EA*

IRS Penalty Abatement - Reasonable Cause & Removal of Penalties

Representation and Client Notices with Case Examples

Collections, Installment Agreements, and Offers in Compromise

Independent Contractor vs. Employee with Volunteer Classification Settlement Program (VCSP)



Allan “A.J.” Reynolds, EA is an Enrolled agent (EA) with immense experience in various areas of taxation, which encompasses over 30 years. His practice centers on individual, business and estate tax preparation, and he specializes in various areas of IRS representation. AJ has been an Iowa Legal Aid volunteer for Tax Court cases and other tax issues. He speaks regularly for multiple tax professional organizations including National Association of Enrolled Agents, National Association of Tax Professionals, and their affiliates and chapters. In addition to presenting in-person continuing education events, he has presented many webinars for these organizations.

Tax Topics with *Beanna J. Whitlock, EA*

Small Business Issues

706 Portability

IRC 754 Election

1031 Exchanges

Minister Taxation



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”.

Please scroll down to the bottom of the brochure for information on IRS Continuing Education. Topics and speakers are subject to change. Please check back for updated information.

**THE 19th ANNUAL CAROLINA CONNECTION
2024 CONVENTION *and* CE SEMINAR**

Classes begin Thursday, May 23, 2024, at 7:55 am and end Friday, May 24, 2024 at 5:00 pm.

Early Bird Special - by March 31, 2024:

- Register for CE by **March 31, 2024** to be entered in a drawing to win a \$100 gift certificate towards a future NCSEA CE event (certificate valid for 2 years).

EDUCATION REGISTRATION Form - Your registration fee includes 2 lunches plus breaks during the CE event.

*Name as it appears on your PTIN registration card. _____ (P+8 digits)
PTIN as it appears on your PTIN registration card

Address, City, State, Zip

Designation - EA, CPA, Esq., Other: _____ Email: _____ @ _____

Phone #: _____ Fax #: _____

Exclusive Offer for Attending NAEA Members: Enhance the skills of your employees. Bring non-member employees with you for member price. Please provide non-members' names and PTINs on a separate sheet.

<u>Participant</u>	<u>Register by April 30, 2024</u>	<u>Register after April 30, 2024</u>	<u>Your Cost</u>
NAEA Member:	\$475.00	\$500.00	_____
Non-NAEA Member:	\$575.00	\$600.00	_____
Member's Non-member Employee:	\$475.00 x _____ (# of employees)	\$500.00 x _____ (# of employees)	_____
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. Non-members can use the non-member link on the website. NCSEA members must **sign in** to obtain their discount. SC Members will need to use the registration code "SCSEA" to register online and receive member rates. If you have forgotten your password, click the "**Forgot password**" link, enter the email that National (NAEA) 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 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 and fax registration form to 828-464-8300.

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

Card #: _____ Card Security #: _____

Name as it appears on card: _____

Signature: _____

How did you hear of the seminar: __ Email __ Postcard __ NAEA Member __ NAEA Website __ NCSEA Website __ Other

Please fax or 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 April 30, 2024.

North Carolina Society of Enrolled Agents
% Candace Cansler, NCSEA Administrator
P.O. Box 937
Conover, NC 28613
Fax: 828-464-8300



North Carolina Society of Enrolled Agents

IRS Approved Continuing Education Provider Number VNKSH

Approved courses for Spring 2024 Carolina Connection CE Event

The following programs have been approved for required IRS Continuing Education Credits for Enrolled Agents. 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.

Attendees at our Spring 2024 CE Event may earn up to 16 hours of IRS Continuing Education.

CPAs, Attorneys, and other professionals should check with their licensing state boards or organizations to determine if credit applies for their continuing education. NCSEA is not a registered sponsor of NASBA Continuing Professional Education.

Please continue to check back for updated information on topics and speakers. Topics, speakers, and schedules are subject to change.

2024 NCSEA/SCSEA Annual Conference Day One Representation

Presented by Allan “A.J.” Reynolds, EA

8 hours IRS Federal Tax Law

These live-group, instructor-led sessions focus on Representation. IRS Penalty Abatement – Reasonable Cause & Removal of Penalties uses the IRM, IRC, Regulations and case law to show how to support taxpayers' reasonable cause positions. Representation and Client Notices with Case Examples illustrates what practitioners can and cannot do to resolve clients' worst tax problems. Collections, Installment Agreements, and Offer in Compromise reviews installment agreements including Partial Pay Installment Agreements and Currently not Collectible status. It analyzes types of Offers with emphasis on the Doubt as to Collectibility program. How to calculate an OIC that the IRS will agree to will be evaluated along with the effects on the statute of limitations. Independent Contractor vs. Employee with Volunteer Classification Settlement Program (VCSP) discusses the VCSP process, how to qualify for the program, and the advantages of the VCSP for those who have been misclassifying workers.

2024 NCSEA/SCSEA Annual Conference Day Two Tax Issues

Presented by Beanna J. Whitlock, EA

8 hours IRS Federal Tax Law

These live, instructor-led sessions focus on tax issues. Small Business Issues covers the pitfalls of small businesses and how to keep taxpayers compliant. Minister Taxation examines the rules for ministers, whether employees or contractors. Election out of Social Security, how to correct improper filings, and conveying to the Minister or governing body of the church how to properly report wages and contract payments paid to the Minister will be discussed. 706 Portability discusses Section 2010(c)(4) and how decedents' estates can elect to transfer any unused estate exclusion on a 706 to the surviving spouse. Participants will understand the deceased spousal unused exclusion (DSUE), when it should be filed and who can benefit. IRC 754 Election explains this election is only available to partnerships, when and how 754 applies, and who can use it. The speaker will cover 1031 Exchanges, the use of an intermediary, and how a 1031 exchange will affect clients if the exchange fails.