Call for Speakers 2020

Four Tracks:

1. NTPI Speakers

2. Grad/Tax Prep Speakers

3. Professional Development Speakers (Practice Management, Small Business Owner)

4. Preconference Workshop Speakers

1.   NTPI Speakers:

National Tax Practice Institute (NTPI) is a three-level program to sharpen the representation skills of practitioners at all stages of their careers. With each level of this program, participants expand their knowledge while gaining the confidence needed to successfully guide their clients through the often-challenging maze of the Internal Revenue Code, tax regulations and agency structure.

Enrolled agents who successfully complete Level 1, 2 and 3 (in order) become an NTPI Fellow. Those who become Fellows join the ranks with others who have achieved the highest educational achievement in representation.

All sessions qualify for CE credit and each education track includes 2 hours of IRS Ethics.

2.   Graduate /Tax Preparation Speakers:

Graduate

Graduate Level in Representation is open to NTPI Fellows AND other highly-qualified representation practitioners.   In these sessions, nationally recognized speakers engage participants in high-level discussions on relevant topics. The Graduate Level program encourages networking and building relationships that provide inspiration and support for all participants. There are new and fresh topics each year so tax professionals can come back year after year for graduate level education.

Tax Preparation Issues Speakers:

Tax Prep Issues is open to ALL tax professionals and is presented at an intermediate to advanced level. Program content changes each year so tax professionals can repeat the tax prep issues year after year and have new relevant topics.

3. **Professional Development Speakers:**

A new education track in 2020 focusing on the many aspects of tax business ownership. Several topics may include: Practice Management, Owning a Tax Business, Selling Your Business, Technology Issues and Implementing Plans—Strategic Business Plan, Data Security Plan, etc.

4. **Preconference Workshops Speakers:**

In addition to the Education Topics offered by NAEA during the National Conference, we would like to extend some additional topics as a Preconference Optional Education offering. The topics can be current tax issues and representation issues for 2020.

The course description/learning objectives must be for a 2-hour to 4-hour course on any relevant tax topic for the tax season.

NAEA Call for Speaker Form

Speaker Name:	
Are you an NAEA Member?	___ Yes ___ No
Are you an NTPI Fellow?	___ Yes ___ No
How many years have you been a tax practitioner?	
Have you previously taught at the NAEA National Conference?	___ Yes __ _ No
Have you previously attended the NAEA National Conference?	___ Yes ___ No
Have you previously taught at an NAEA Affiliate? If so, which one and what course(s)?	___ Yes ___ No
What is your preferred contact number?	
What is your preferred email address?	
Please indicate your appropriate professional category? All applicants must be an enrolled agents, CPAs, or tax attorneys with representation expertise.	___ Enrolled Agent ___ Tax Attorney ___ Certified Public Accountant ___ Other
The NTPI Planning Committee is interested in offering the following courses. Please select courses within your area of demonstrated expertise. ****Selecting a course indicates a willingness to develop and teach material in this category.**	**Level 1:** ------ Level 1: Representation 101: Overview of Representation ------ Level 1: Collections 101: Introduction to Collections ------ Level 1: Coming In Out of the Cold: How to Assist Non-Filers ------ Level 1: 1040 Case Study ------ Level 1: Practitioner Ethics ------ Level 1: Exam 101: Introduction to Examination ------ Level 1: Dear IRS: How to Communicate with the IRS ------ Level 1: Statute of Limitations ------ Level 1: Penalty Abatement ------ Level 1: Foundational Rep Tools: Transcripts and CSED ------ Level 1: Appeals 101: Introduction to Appeals ------ Level 1: Dear Taxpayer: How to Communicate with Taxpayers ------ Level 1: Hitting the Books: Tax Research and Resources

	Level 2:
	------ Level 2: Representation Lexicon: How to Translate IRS
	------ Level 2: FOIA: The Best Things in Life are Free
	------ Level 2: Examination 201: Preparing for an Audit
	------ Level 2: Form 1040 Audits
	------ Level 2: Collections 201: Enforced Collections
	------ Level 2: Collections 202: Forms 433 A-F
	------ Level 2: Examination 203: Audit Reconsideration
	------ Level 2: Ethics 201: Practitioner Ethics
	------ Level 2: Appeals 201: Examination Appeals
	------ Level 2: Appeals 202: Collection Appeals
	------ Level 2: That's a Wrap: NTPI Level 2 Summary
	------ Level 2: Representation Case Study
	------ Level 2: Representing Clients with Certified Tax Debt
	Level 3:
	------ Level 3: Ethics 301: Our Professional Obligations
	------ Level 3: Statute of Limitations
	------ Level 3: Criminal Investigations
	------ Level 3: Innocent Spouse
	------ Level 3: Appeals 301: Advanced Issues in Appeals
	------ Level 3: Collections 301: Bankruptcy
	------ Level 3: Exam 301: Advanced Examination
	------ Level 3: Representation 302: Correcting Bad Actions of Clients
	------ Level 3: Collections 302: Trust Fund Recovery Penalties
	------ Level 3: Collections 303: Preparing Forms 656 and 433-A for Offer in Compromise
The NTPI Planning Committee is interested in offering the following classes: Advanced Level Representation **Selecting a course indicates a willingness to develop and teach material in this category	___ 105 Benefits
	___ Advanced Employment Cases – Letter 903 and Possible Injunction
	___ Audit and Cryptocurrency
	___ Audit and Marijuana Businesses
	___ Audits – Statutory Employees/Non-Employees
	___ Audits Involving Truckers
	___ Cybersecurity
	___ Employer-Shared Responsibility Payment

	___ Ethics
	___ ID Theft
	___ Interactive Advanced Case Study
	___ IRS Collection from LLC
	___ Post-TCJA Representation Issues
	___ Representing Clients in Community Property States
	___ Representing Marijuana Businesses with Collection Issues
	___ Representation Update
	___ Revocation or Denial of Passport
	___ Taxpayer First Act
	___ Yearly Review of Tax Court Cases
	___ Worker Classification Audits and Issues
The Tax Education Committee is interested in offering the following classes Individual Tax Preparation **Selecting a course indicates a willingness to develop and teach material in this category	------ Advanced Ethics Topics – Fraud and/or General Ethics, Circular 230 Compliance, Contingency Fees
	------ Data Security Plans – How to Write a Plan (Required by IRS)
	------ Unethical Tax Preparers – What to Do?
	------ Casualty Losses under TCJA /Itemized Deductions under TCJA
	------ Taking on a New Client
	------ Update on Cryptocurrency
	------ Mortgage Interest Deduction Limitations
	------ Selling Principal Residences & Second Homes
	------ Tax Pro as Police – New Due Diligence
	------ Social Security & Medicare and Tax Planning for Senior Citizens (Tax Issues for Senior Citizens)
	------ Intermediate K-1s
	------ NOLs (Net Operating Losses) – Don't Lose Out When Dealing with NOLs
	------ 2020 Tax Season Updates
The Tax Education Committee is interested in offering the following classes: Business Tax Issues **Selecting a course indicates a willingness to develop and teach material in this category	------ Entity Choice after TCJA – For Small Businesses (Partnership to S Corp)
	------ Deep Dive into Form 4797 – Sale of Business & Rental Property
	------ Digital Media /Social Influencer Issues: Business or Hobby?
	------ Sorting Hat Rules for 199A
	------ Qualified Business Income Deduction & Reasonable Compensation
	------ TCJA –Advanced Issues
The Tax Education Committee is interested in offering the following classes:	------ Foreign Trust and Foreign Gifts

International Issues **Selecting a course indicates a willingness to develop and teach material in this category	------ Foreign Income and Treaty-Based Return Position Disclosure ------ International Tax Forms (What Every Tax Pro Should Know) ------ Streamlined Compliance: Appropriate? Effective? Risky? ------ Is it Offshore Entities and Subpart F Income? Subpart F Income – What your Client Neglects to Tell You? ------ Foreign Income Landmines: Section 965, PFIC, Foreign Pensions
The Tax Education Committee is interested in offering the following classes: Real Estate Tax Prep Topics **Selecting a course indicates a willingness to develop and teach material in this category	------ Moving Your Rental into an Entity ------ Rental Real Estate & 199A
The Tax Education Committee is interested in offering the following classes: Miscellaneous Tax Prep Topics **Selecting a course indicates a willingness to develop and teach material in this category	___ Other
* Title: **Your title should capture, in 15 words or less, who your session is for and the topic that will be covered. It is recommended that the titles are clear about the content and why a person would want to attend.**	
* Description of Session: **Description and overall purpose of the educational session should, in 200 words or less, build on your title, focus on takeaways, and be as persuasive and concise as possible. If selected, the description will be used in marketing efforts.**	
* Level of Presentation: **Consider your audience. What level would you recommend this session to?**	___ Beginner ___ Intermediate ___ Advanced

Learning Objectives and Content

Important:

Learning objectives/outcomes (for breakouts and pre-conferences) set the direction of the session and keep the presentation or training focused. To help bring the content to life and make it actionable, please clearly define how your session will support attendees in implementing and applying their learnings back at the office. Put the emphasis on participants acquiring skills, rather than simply receiving knowledge. For help writing objectives/takeaways try combining a skill that participants need to know how to do then what they need to know in order to do that. For example, you can complete the stem "Upon completion of this course, participants will be able to…." See link for "Guidelines for writing learning objectives and content" on the welcome screen.

- *Each Learning Objective should complete the phrase, "Upon completion of the course, participant should be able to…"*
- *Each Learning Objective must begin with one of the approved verbs.*

SAMPLE:

* Learning Objective #1:	
* Learning Objective #2:	
* Learning Objective #3:	
* Learning Objective #4:	
* Learning Objective #5:	
* Learning Objective #6:	
NAEA expects instructors to use PowerPoint slides, created on or imported to standard NTPI/National Conference slide templates. Please initial below to confirm understanding of this expectation.	
The intention is for the class to have an interactive component. Please provide a brief outline of your suggested courses and your method of providing interaction.	
Course materials will be provided to attendees in a secured electronic format. Students have also expressed interest in having electronic copies of PowerPoint presentations for note-taking. Are you willing to allow NAEA to provide PowerPoint presentations to students in PDF format? *	__ Yes ___ No
List your educational background and areas of occupational experience. If more space is needed, please attach.	
Please provide contact information for two references who are well placed to provide a recommendation on your presentation skills and course content.	

By typing my name below, I am providing it to represent my electronic signature approving all the information entered in this Call for Speaker Form. I further attest that all submitted information is accurate.

Signature:	
Date:	

ACTION & MEASURABLE VERBS FOR LEARNING OBJECTIVES
Bloom's Taxonomy of Educational Objectives (1956): Cognitive Skills

Foundational	**Knowledge Level: The successful student will recognize or recall learned information.**

list	record	underline
state	define	arrange
name	relate	describe
tell	recall	memorize
recall	repeat	recognize
label	select	reproduce

Comprehension Level: The successful student will restate or interpret information in their own words.

explain	describe	report
translate	express	summarize
identify	classify	discuss
restate	locate	compare
discuss	review	illustrate
tell	critique	estimate
reference	interpret	reiterate

Applied	**Application Level: The successful student will use or apply the learned information.**

apply	sketch	perform
use	solve	respond
practice	construct	role-play
demonstrate	conduct	execute
complete	dramatize	employ

Analysis Level: The successful student will examine the learned information critically.

analyze	inspect	test
distinguish	categorize	critique
differentiate	catalogue	diagnose
appraise	quantify	extrapolate
calculate	measure	theorize
experiment	relate	debate

Strategic	**Synthesis Level: The successful student will create new models using the learned information.**

develop	revise	compose
plan	formulate	collect
build	propose	construct
create	establish	prepare
design	integrate	devise
organize	modify	manage

Evaluation Level: The successful student will assess or judge the value of learned information.

review	appraise	choose
justify	argue	conclude
assess	rate	compare
defend	score	evaluate
report on	select	interpret
investigate	measure	support