Call for Speakers 2021

Four Tracks: (Request for Proposal)

1. NTPI Speakers
2. Grad in Rep Speakers
3. Tax Track Speakers
4. Practice Management Speakers (Practice Management, Small Business Owner)

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.

The course materials for each level will be assembled into one bound, 10-tab book with each tab representing a course in the level. Each course will have the following materials:

1. Table of Contents (TOC)
2. Executive Summary with footnotes to authority showing the most important points from each course (20-25 for most courses)
3. Handout for active learning exercise
4. Printout for at least two key authorities for reference
5. At least two sample completed forms or other deliverables
6. PowerPoint presentation (slide deck)

NTPI Level 1 Curriculum:

- Review a taxpayer’s IRS transcripts and case data to determine appropriate resolution strategies;
- Get a non-filer into filing compliance;
- Resolve automated underreporter notices, such as CP2000.
- Establish a guaranteed or streamlined installment agreement for a taxpayer;
- Request a penalty abatement using First Time Abatement procedures.

NTPI Level 2 Curriculum:

By the end of Level 2, a participant will be able to successfully complete the following engagements:

- Determine the best way to challenge an existing audit assessment;
- Determine which collection appeal option is appropriate for a taxpayer;
- Get a levy released for a taxpayer;
- File an offer in compromise for a taxpayer;
- Represent a client in an office examination.

NTPI Level 3 Curriculum:

By the end of NTPI Level 3, a participant will be able to successfully complete the following:

- Challenge a taxpayer's liability for a tax assessment or unpaid balance with an innocent spouse defense;
- Represent a taxpayer in an IRS field examination with a Revenue Agent;
- Contest the issuance of a notice of federal tax lien;
- Contest liability for the trust fund recovery penalty;
- Partner with an attorney on bankruptcy cases with tax components.

The NTPI Planning Committee is interested in offering the following courses. Please select from the list of courses within your area of demonstrated expertise.

Level 1: (New-2021) –Learning Objectives will be given by NTPI committee

------ Level 1: Introduction to Representation – 2 CE

------ Level 1: Statute of Limitations – 2 CE

------ Level 1: IRS Exam Process – 2 CE

------ Level 1: IRS Collection Process – 2 CE

------ Level 1: IRS Transcripts Analysis – 2 CE

------ Level 1: Introduction to Examination – 2 CE

------ Level 1: Non-Filers & SFR Assessments – 2 CE

------ Level 1: Overview of Collection Alternatives – 1 CE

------ Level 1: Basic Installment Agreements – 1 CE

------ Level 1: Financial Analysis Process – 2 CE

------ Level 1: Ethics (Level 1) – 2 CE

------ Level 1: Managing Confidential Client Data – 2 CE

------ Level 1: Capstone Course: Level 1 – 2 CE

Level 2: (New – 2021) –Learning Objectives will be given by NTPI committee

------ Level 2: Freedom of Information Act (FOIA) Requests – 1 CE

------ Level 2: Internal Revenue Manual – 1 CE

------ Level 2: The Audit Reconsideration Process – 2 CE

------ Level 2: Office Audit Case Study – 2 CE

------ Level 2: Enforced Collection Actions – 2 CE

------ Level 2: Offers in Compromise – 2 CE

------ Level 2: Collection Appeals – 2 CE

------ Level 2: Examination Appeals – 2 CE

------ Level 2: Penalty Abatement Strategies – 2 CE

------ Level 2: Introduction to Business Representation – 2 CE

------ Level 2: Ethics (Level 2) – 2 CE

------ Level 2: Case Management Strategies – NAEA – 2 CPE

------ Level 2: Capstone Course (Level 2) – 2 CE

Level 3: (Current-2020) –Learning Objectives will be created by each speaker

------ Level 3: Advanced Exam – 4 CE

------ Level 3: Offer in Compromise – 4 CE

------ Level 3: Ethics (Level 3) – 2 CE

------ Level 3: Criminal Investigation – 2 CE

------ Level 3: Trust Fund Recovery Penalty – 2 CE

------ Level 3: Penalty Abatement – 2 CE

------ Level 3: Bankruptcy – 2 CE

------ Level 3: Advanced Appeals – 2 CE

------ Level 3: Statute of Limitations (SOLs) – 2 CE

------ Level 3: Capstone Course (Level 3) – 2 CE

2. Graduate in Rep Speakers:

Graduate Level in Representation

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.

Graduate in Representation

The NTPI Planning Committee is interested in offering the following classes in Advanced Representation.

Topics (for 2021)

- Advanced Collections Case Study – 2 CE
- Advanced Exam Case Study – 2 CE
- Representation Update – 2 CE
- New Case Law Relevant to Representation – 2 CE
- Ethics (Grad Level) – 2 CE
- Practice Management & Marketing/Biz Development -- 2 NAEA CPE
- Practice Management & Marketing/Biz Development – 2 NAEA CPE
- 5 Electives -- 10 CE

Total CE: 24

3. Tax Track Issues Speakers:

Tax Track 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.

Tax Track Topics/ Issues (2021)

The Tax Education Committee is interested in offering the following classes in Tax Preparation. Selecting a course indicates a willingness to develop and teach material in this category.

Individual Issues:

------ Carryovers

------ Community Property Effects on income Tax Returns

------ Credits & Deductions for Separate Households after Divorce

------ Inherited IRAs, Retirement Plans, RMDs, & the New Life Expectancy Tables – A Comprehensive Review

------ Correcting Errors on Info Returns

------ Cryptocurrency

------ Custodial Parents & Dependents

------ Deep Dive on Depreciation

------ Deep Dive – Schedule C (PPP / EIDL Programs)

------ Employee Stock Options

------ Hidden Gems in Brokerage Statements

------ Issues on the IRS Radar (Conservation Easement, Cryptocurrency)

------ Losses from Scams

------ Low Basis Assets Planning (Opportunity Zones)

------ Net Operating Losses (NOLs)

------ Tax Changes on the Horizon – Planning for Tax Changes

------ Taxation of Sports Gambling

------ Tax Updates

Business Tax Issues:

------ Abandonment of Businesses

------ Winding Down Entities (Trust Fund Recovery Penalties)

------ Maximizing 199A

------ Partnership Inside & Outside Basis

------ Tax Updates (Biz)

------ S Corporation Entity Level Taxation (Passive Net Income Tax)

------ S Corporation Reasonable Compensation during Covid-19

Gift, Estates & Trusts Issues:

------ 1041 Line by Line

------ Trust/Estate/Gift: IDGTs & Trusts

International Issues:

------ Foreign Retirement Accounts that are Trusts

------ PFICs

Real Estate Issues:

------ Rental (Sales of Rental Properties)

Other Topics:

------ Tax Planning for Bankruptcy

------ Client Questionnaire & Interviewing the Client

------ Data Security Plan

------ E-Signatures & Forms 2848 & 8821

------ Practical Cyber Security

4. Practice Management Speakers:

This education track in 2021 will focus 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.

Practice Management Topics: -Learning Objectives will be supplied by each speaker

- Client Portals
- Direct Marketing for your Business
- E-Services
- Practice Management Issues Nobody Ever Talks About: (including)
    - Credit Card Processors
    - CRM
    - E-Fax
    - VOIP phones
    - Etc.
- Technology Tools
- Succession Planning /Winding Down
- Write your Data Security Plan

2021 Call for Speakers – Questions:

NTPI

1. Speaker Name
2. Are you an NAEA member?
3. Are you an NTPI Fellow?
4. How many years have you been a tax practitioner?
5. Have you previously taught at the NAEA National Conference?
6. Have you previously attended the NAEA National Conference?
7. Have you previously taught at an NAEA Affiliate? If so, which one and what courses?
8. What is your preferred method of contact? Telephone, Text? E-Mail?
9. Please indicate your appropriate professional category? (All applicants must be Enrolled Agent, CPA, Tax Attorney with Representation Expertise)
10. NAEA expects instructors/speakers to create or use the standard NAEA National Conference slide template. You will be asked to produce a slide deck with an NAEA template. Please initial.
11. The intention is for the class to have an interactive component. Please provide an outline of your suggested courses and your method of providing interaction.
12. Course materials will be provided to each conference attendee in a secured electronic format. Students also have expressed interest in having electronic copies of PowerPoint presentations for note-taking. Are you willing to allow NAEA to provide PowerPoint presentations to the students in a PDF format?
13. List your educational background and areas of occupational experience. If more space is needed, please attach a separate document.
14. Please provide contact information for two references who are well placed to provide a recommendation on your presentation skills and course content.