



Volume 19 Issue 2

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## The President's Message

Hello Kansas NATP Chapter & friends:

I hope you have had a fun Summer, i.e. vacation trips, baseball, swimming, family & friends while working on some of those returns on extension. Now we have to press harder to get those returns all done by the deadlines. Although it is an enjoyable & challenging business, it takes a lot more than a basic understanding of income tax rules and the latest software to make a tax business profitable, to gain clients, be efficient and knowledgeable in the vast tax industry.

Fortunately the National Association of Tax Professionals (NATP) has become an organization with tremendous resources to assist us in becoming the Tax Professionals we need to be. The 2015 NATP National Conference in New Orleans, July 20-24, was another great opportunity for training with National staff & Board Members, as well as attend many sessions with exceptional teachers/presenters. There are many other avenues to gain the tax training you need. You may find the Best Practices for the Tax Office, a follow up to Audit Proof the Tax Office, manuals particularly helpful and available at the NATP bookstore.

Board Members and other leaders of the Kansas Chapter of NATP, have been busy working with the Internal

Revenue Service and others in arranging for two KS NATP/ IRS Tax Symposiums, one August 20, 2015 again at the Johnson County Community College and on September 17, 2015 in Wichita at the Wichita State University, Small Business Development Center.

You can register online at [natptax.com](http://natptax.com). Hope to see you at these events. These Symposiums are a very economic way to gain CPE credits, tax knowledge, and an opportunity to ask questions of IRS & other presenters. Register by going online at [natptax.com](http://natptax.com) and go to Chapters, you will see so much in the way of resources that the Chapters and members have.

If you are hunting for something, feel free to call and ask the National staff (800-558-3402) or the Kansas Board Members & Officers for help in finding what you need. KS-NATP will again be offering tax seminars as a part of the Annual Meeting October 26 at the DoubleTree by the Airport in Wichita, the Fall Seminar November 11 at the DoubleTree in Overland Park and the Western KS Seminar in Hays at the Sternberg Museum on December 8.

You will be able to register online for those events as the time approaches. These three events provide the opportunity to get State (KS, OK & MO) updates (no CPE) as well as Federal sessions for CPE.



*From the Sunflower State.*

The NATP 1040 workshops are held in the two days following the Annual Meeting and the two days leading up to the Fall Seminar.

KS-NATP is considering options for bringing National level presenters to our area; please let us know what you think. If you have issues with what you see happening or not happening and you have suggestions, please let me or another Board Member know so we can have a chance to address the issue.

Again, I encourage all our KS-NATP members to develop contacts amongst as many of our KS NATP Board Members & Chairpersons as possible. Be a mentor to each other. KS NATP wants you to be successful in your tax business.

Have an enjoyable FALL!!

Tim Cain, President of KS NATP

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# **My Impressions of the New Orleans NATP National Conference**

**By Sara Wright**

New Orleans, the city of lights, jazz, Creole food, and the 2015 NATP conference; this was an experience I will never forget. The week was jam-packed with a smorgasbord of classes to choose from, good times with fellow colleagues and amazing culture. It has been ten years since I last attended an NATP conference and I could not have asked for a better reminder of why they are so much fun to attend.

Arriving at the hotel was definitely an experience, but nothing you would not expect from having 1,200 plus people all converging on a location all at one time. The staff was prepared and things went as smooth as one could hope for. The hotel was beautiful and well located. We were situated in the heart of New Orleans with plenty of restaurants and entertainment within walking distance.

The conference kicked off with a keynote speaker that had a lot of great knowledge and motivation to rally everyone's spirits and get us excited for the week ahead of us. NATP had many classes to choose from each being labeled basic to intermediate; taught by instructors who were very entertaining and knew how to keep our attention through the class. After attending many of the classes; however, it seemed to me that they were mislabeled. Many classes were labeled intermediate but in reality were more on a basic level. I am not sure if this had to do with class times and the time allotted to each instructor. Classes were kept at approximately 1.5 hours. This allowed for each individual to pack in several courses throughout each day but with such a short amount of time it was difficult to get into the functionality of the topic. Each instructor was great about providing tools to research the topic more on your own. With the opportunity of so many classes, this annual conference provides many hours for continuing education credit. I was able to fulfill an entire years worth of hours in one week. I was disappointed to see there were no classes on identity theft. I feel there should have been a class to discuss this topic as it seems to be affecting everyone.

The conference was a great experience overall. The city was beautiful and offered many levels of entertainment for everyone in attendance. NATP did an amazing job providing opportunities throughout the week to socialize with colleagues. The closing banquet was amazing – even if we had to sit on each other's laps. Every year the conference holds a charity auction to help a local cause. This year NATP raised \$38K for Café Reconcile which helps local youth make a positive change in their lives. I love that NATP uses this opportunity to give back to the hosting city.

Personally, New Orleans is not a city for me and I would not see myself traveling back there for another conference. However, I can see how this was a great city given all the entertainment options. I can say without a shadow of a doubt that no one was twiddling their thumbs looking for something to do.

The week spent at the conference gave everyone a chance to get to know others in the field. On many occasions it was nice to put a face with a voice that we have known for years. It was also a wonderful experience to see how other firms throughout the country conduct business. NATP truly cares what members think about the conference and provided many surveys to help better themselves and the events through suggestions. I hope future NATP conferences are just as much fun and education filled.

I do not see me attending the NATP conference every year due to the amount of time spent away from the office, but I do foresee me attending the conference more often than every ten years! The week was a very enjoyable experience and I walked away with many memories, laughs and great tools to help better my practice.

## *Important Dates to Remember for 2015:*

WHAT	DATES	WHERE
IRS Symposium	08/20/2015	JCCC-Overland Park, KS
IRS Symposium	09/17/2015	WSU-Small Bus. Dev. Ctr.-Wichita, KS
KS NATP BOD Mtg	10/25/2015	DoubleTree Hotel-Wichita, KS
KS NATP Ann. Mtg. & Seminar	10/26/2015	Hilton DoubleTree-Wichita, KS
NATP Essential & Beyond	10/27-28/2015	Hilton DoubleTree-Wichita, KS
NATP Essential & Beyond	11/9-10/2015	DoubleTree Hotel-Overland Park, KS
KS NATP Fall Seminar	11/11/2015	DoubleTree Hotel-Overland Park, KS
KS NATP Western Seminar	12/08/2015	Sternberg Museum-Hays, KS

### EDUCATIONAL

### SEMINARS



### MEETINGS

If you have a suggestion for a topic for these seminars, please contact Tim Graham or Tim Cain. Their phone numbers are located on the last page of this publication. We are planning to have door prizes



## Same-Sex Marriage Update

By Nolin Christensen

Well, it's now official here in the State of Kansas that same sex married couples can file a joint state tax return.

The easy part? File them just like you would any other married filing joint return. All the rules that apply to any joint return now apply to same-sex joint returns. There is no difference between opposite-sex couples and same-sex couples when it come to filing a tax return.

The hard part? Did they update their last names? There are a lot of folks going and getting name changes. Some to the same last name as one of the partners, others are going hyphenated. So... the question to ask them when they come to your office, WHEN did you get your name changed. Just as with joint returns in the past, the date they change their name can affect their ability to e-file with their current name. Ask when they updated the names and if it was before September, then you're probably good to go. If it was after September, then you might have issues e-filing. 1st e-file it with the changed name. If it transmits and you get an acceptance, YEA, you're done. If it rejects due to a name mismatch, then change it back to what they had prior to the name change and retransmit.

If there was a couple from 2014 who filed separate single returns, they can now go back and amend the state return to be married filing joint, however, you need to remember that they had to have filed a married filing joint federal return.

## A First-Timer's NATP National Conference Experience

### By Tammy Harmon, EA

Admission is the first step, so here it goes: I am not a networker. I love visiting with my clients and a few close referral contacts. Beyond that, you won't find me at Chamber after hours events or passing out cards at Optimist Club meetings. I prefer to catch up on the latest tax developments from the back rows of local NATP events or enjoy the obliviousness of Facebook tax groups. You can imagine then the apprehension I felt when I took the leap and signed up to attend the national NATP conference this year in New Orleans. I'd thought about attending many times before, but this time was different—I actually clicked the registration button and made my travel reservations before I could back out. Now as a first time conference attendee, what was my experience? I can't believe I waited this long to attend!

It would be impossible to sum up everything I learned in those four days, but there were a few themes that appeared in the sessions I attended. First, there is a lot of opportunity in our profession, as our clients need us more than ever (despite what TurboTax commercials say). One of my favorite quotes from the conference came from the opening speaker, Avish Parashar. "People used to come to us for advice. Now they've spent 5 hours on Google and come to us with answers...and get mad when our advice doesn't match their answers." It's up to us then to adapt to this climate and help our clients navigate with the correct advice. This year we had new ACA provisions, repair regulations, and increased scrutiny of refundable credits—all reasons why many taxpayers should not be plugging numbers from tax forms into self-prepared returns.

While helping clients, however, we also need to protect ourselves and our practices (otherwise known as CYA). While this certainly isn't a new concept in this industry, I was surprised how every single one of the sessions I attended dealt with specific practice management ideas in this area. In LG Brook's POA session, there was much discussion regarding using the 8821 form to evaluate a client's situation before committing to the 2848 form (with a good engagement letter of course). Monica Haven's FBAR class reminded me to never underestimate the importance of asking all the right questions every time for every client. Do our clients have signature authority on a family member's foreign account or an online gambling account? A 50% penalty means ask and ask some more. A presentation by Travelers insurance also reminded me of the seriousness of cyber liability. Identity theft is on the rise, and let's face it, our offices contain a treasure trove of information.

Finally, as professionals, we can never stop learning—and learning from each other is even better. During the conference sessions, I got satisfaction from knowing a lot of the material already, but there were plenty of "uh-oh" moments where I realized I should be doing things differently or better. As a solo practitioner, I've always been focused on what is happening in my office, but some of the most beneficial things that I learned during the conference came between sessions or during dinner, from fellow attendees on how they run their practices. That's when I realized how much I have truly been missing. Having been a member of NATP for seven years, it never clicked with me until now how beneficial this professional association could be for education, and more importantly, networking.

So while you'll still find me at local NATP events sitting in the back rows, this conference has made me want to do better at taking care of my clients, running my practice, and participating in this community of tax professionals. I was fortunate to meet several members of our local chapter at the national conference and for these new friendships, I am truly grateful. It's nice to know that every time I encounter the clients or situations that could make for an entertaining reality show, you are there dealing with the same things. I look forward to more NATP events, and I can't wait for the next national conference in Indianapolis!

## MEET YOUR KS-NATP BOARD MEMBERS

### CHRISTY DUNHAM

Tax practice was not my intended profession! I graduated from PSU with my Bachelor's Degree in History and a minor in Business Administration with a concentration in Accounting. In the 80's, I worked for a private Oil and Gas Company for about five years doing payroll, books, general accounting and other administrative tasks.

When the price of oil plummeted I went to work for a local law firm. I returned to PSU and received my certificate of Paralegal Studies. I continued to work in the legal field in domestic law, collections, and government contracts. The company I worked for in government contracts wanted me to transfer to GA, but my family did not want to move. When they closed their local office, I decided it was time to work for myself.

I started my own business doing tax preparation, payroll, books, and general accounting. I had been doing tax returns for friends and family for years, but now I was charging for that service! I shared an office with a good friend and colleague, Jim Cozad in Independence, KS. When Jim passed away, about a year later, I inherited his practice. So my workload doubled and I was all alone!!!

I started searching for an organization that I could look to for support. That's when I found NATP. I attended a Wichita Tax Symposium and meet Peggy Beasterfeld! I joined that day on the spot and consider myself blessed for having found such a wonderful organization that has all the help, support and resources for you to be successful in your career!! I am excited to be on the board and look forward to making our KS Chapter one of the best.

My most challenging tax season was this past year when I suffered a massive coronary and had triple by-pass heart surgery in February. But it is amazing how God's timing and a little blood pumping through your heart can make you feel like a new person! I am back to working full-time, had about 50% of my clients file extensions and wait for me to prepare their returns, so we are getting back on track and gearing up for our next tax season.

I reside in Independence, KS, with my husband of 31 years, Robert. He owns a dry cleaning business as well as helping me out in the office. We have three grown children, my oldest daughter, Ashley, lives in Haysville and works for the City of Wichita; my middle daughter, Amberlea, just moved to Blackwell, OK where she is teaching 6th grade Science and Coaching; my son, Lee, lives in Independence and owns his own business. I am trying to recruit him into the tax business and I think I am making ground!!! Okay, this is me in a nut shell. Of course I am the nut!!!!



# Computer Security

## *(Federal Trade Commission Consumer Information)*

Getting rid of your old computer? You can ensure its hard drive doesn't become a treasure chest for identity thieves. Use a program that overwrites or wipes the hard drive many times. Or remove the hard drive, and physically destroy it.

### *Understand Your Hard Drive*

Computers often hold personal and financial information, including:

- passwords
- account numbers
- license keys or registration numbers for software programs
- addresses and phone numbers
- medical and prescription information
- tax returns
- files created automatically by browsers and operating systems

When you save a file, especially a large one, it is scattered around the hard drive in bits and pieces. When you open a file, the hard drive gathers the bits and pieces and reconstructs them. When you delete a file, the links to reconstruct the file disappear. But the bits and pieces of the deleted file stay on your computer until they're overwritten, and they can be retrieved with a data recovery program. To remove data from a hard drive permanently, the hard drive needs to be wiped clean repeatedly.

### *How to Clean a Hard Drive*

Before you clean a hard drive, save the files you want to keep to:

- a USB drive
- a CD Rom
- an external hard drive
- a new computer

Check your owner's manual, the manufacturer's website, or its customer support service for information on how to save data and transfer it to a new computer. Utility programs to wipe a hard drive are available both online and in stores where computers are sold. These programs generally are inexpensive; some are available on the internet for free. These programs vary:

- Some erase the entire disk, while others allow you to select files or folders to erase.
- Some overwrite or wipe the hard drive many times, while others overwrite it only once.

Consider using a program that overwrites or wipes the hard drive many times; otherwise, the deleted information could be retrieved. Or remove the hard drive, and physically destroy it. If you use your home or personal computer for business purposes, check with your employer about how to manage the information on your computer that's business-related. The law requires businesses to follow data security and disposal requirements for certain information that's related to customers.

### *How to Dispose of Your Computer*

**Donate it.** Many organizations collect old computers and donate them to charities.

**Recycle it.** Many computer manufacturers have programs to recycle computers and components. Check their websites or call their toll-free numbers for more information. The Environmental Protection Agency (EPA) has information about electronic product recycling programs. Your local community may have a recycling program, too. Check with your county or local government, including the local landfill office for regulations.

**Resell it.** Some people and organizations buy old computers. Check online.

Remember, most computer equipment contains hazardous materials that don't belong in a landfill. For example, many computers have heavy metals that can contaminate the earth. The EPA recommends that you check with your local health and sanitation agencies for ways to dispose of electronics safely.

# Kansas



National Association  
of Tax Professionals

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## Kansas State Trivia—Did You Know...?

(from 50states.com)

A grain elevator in Hutchinson is 1/2 mile long and holds 46 million bushels in its 1,000 bins

Kansas won the award for most beautiful license plate for the wheat plate design issued in 1981

Dodge City is the windiest city in the United States.

At one time it was against the law to serve ice cream on cherry pie in Kansas.

The first woman mayor in the United States was Susan Madora Salter. She was elected to office in Argonia in 1887.

Smith County is the geographical center of the 48 contiguous states

There are 27 Walnut Creeks in the state.

Morton County sells the most trout fishing stamps of all the Kansas counties.

### Member Get a Member

Do you know someone who might be interested in NATP and all the benefits for members?

You might want to check out National's "Member Get a Member" campaign. You could win a \$15 or \$30 gift card, a free membership, or even \$1,000 in cash!

Just put your name on NATP Membership Enrollment forms in the "Who recommended your to NATP?" line and hand them out to non-member tax professionals. When they join...you win!!

## Budding Authors Welcome!!!

THERE ARE FIVE  
SYMPOSIUMS AND  
SEMINARS  
BETWEEN NOW  
AND TAX SEASON.  
MAKE SURE YOU  
ATTEND



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**Susan Fesler**– Nominating

**“Here to Serve”**