

Core Financial Resources  
120 E Beltline Blvd.  
Anderson, SC 29621



North Carolina Society  
&  
South Carolina Society  
of Enrolled Agents  
announce



## THE 14<sup>th</sup> ANNUAL CAROLINA CONNECTION 2019 CONVENTION and CPE SEMINAR

**In Beautiful Myrtle Beach, SC**  
**When: May 19th - May 21st**  
**Where: Hilton Hotel – Myrtle Beach, SC**  
**Why: Earn 18 hours of the best CPE**

We are offering 2 different educational tracks. Network with tax pros from east to west. Participate to win great items in the “Silent Action” every day. Earn a total of 18 hours of CPE. Registration cost includes two lunches, and breaks. Room rates include two continental breakfasts.

### Representation Track Frank Agostino, Esq.

- IRS Collection:
- Responding to IRS notices
- Installment Agreements
- Offers in Compromise
- Collection Due Process
- IRS Examination
- International Forms & Penalties including Preparation
- Examination, Appeals, and Tax Court
- Substantiating Deductions and Income Reconstruction

### Tax Track with Kathryn Morgan, EA, USTCP

- The Military Taxpayer: Helping our Heroes! (2hrs)
- Tax Research Tips & Techniques for Citations, Court Cases & Basis Reconstruction (2hrs)
- Residential Rentals: Money Pit or Hidden Gem (2hrs)
- The Smart Attorney's Best Friend: The Tax Professional (2hrs)
- The Gig Economy (2hrs)
- The Taxpayer Advocate: What They Can and Can Not Do (1hr)
- Reporting Fraudulent or Unqualified Preparers: Whose Job Is It? (1hr)
- Living Off the Grid: Bringing Clients into Compliance (2hrs)
- 2019 Tax Update (2hrs) (Sec 199-A in particular)



## THE 14<sup>th</sup> ANNUAL CAROLINA CONNECTION 2019 CONVENTION & CPE SEMINAR

Registration and Payment forms available online at  
[www.NCseaonline.org](http://www.NCseaonline.org) or [www.SCsea.org](http://www.SCsea.org)

## CAROLINA EAs Re-CONNECT | PROGRAM & SCHEDULE

Sunday, May 19th, 2019

3:00pm – 4:00pm: Registration & Check-In

4:00pm – 5:40pm: Joint Kickoff Ethics Session (2 CPE hours) Kathryn Morgan, EA

Please use this evening to enjoy Myrtle Beach at your leisure.

Monday, May 20th, 2019

8:00am – 11:40pm: Dual Track Classes (with appropriate breaks)

11:40pm – 12:40pm: Lunch with Keynote Speaker

12:40pm – 1:40pm: NC and SC Annual Meetings

1:40pm – 5:30pm: Dual Track Classes (with appropriate breaks)

Please use this evening to enjoy Myrtle Beach at your leisure.

Tuesday, May 21st, 2019

8:00am – 11:40am: Dual Track Classes (with appropriate breaks)

11:40am – 12:40pm: Lunch

12:40pm – 4:30pm: Dual Track Classes (with appropriate breaks)

— WE ARE UNABLE TO OFFER THE SPLITTING OF TRACKS. SEE BELOW FOR TRACK OPTIONS. —

### Representation Track

with Frank Agostino, Esq.

- IRS Collection:
- Responding to IRS notices
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- Offers in Compromise
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Frank Agostino is the president of Agostino & Associates, P.C., a law firm in Hackensack, New Jersey specializing in civil and white collar criminal litigation, tax controversies and tax planning.

Prior to entering private practice, Mr. Agostino was an attorney with the Internal Revenue Service's District Counsel in Springfield, Illinois and Newark, New Jersey. He also served as a Special Assistant United States Attorney, where he prosecuted primarily criminal tax cases.

As an adjunct professor, Mr. Agostino taught tax controversy at Rutgers School of Law and served as the co-director of the Rutgers Federal Tax Law Clinic.

Mr. Agostino is a frequent speaker and author on tax controversy and litigation matters. He serves on the Advisory Board of the Journal of Tax Practice and Procedure. Mr. Agostino is actively involved with the American Bar Association and the New York County Lawyers' Association. Mr. Agostino is also the President of the Taxpayers Assistance Corp., which provides tax and legal advice to low income taxpayers in the NY/NJ area.

### Tax Track

with Kathryn Morgan, EA, USTCP

- The Military Taxpayer: Helping our Heroes! (2hrs)
- Tax Research Tips & Techniques for Citations, Court Cases & Basis Reconstruction (2hrs)
- Residential Rentals: Money Pit or Hidden Gem (2hrs)
- The Smart Attorney's Best Friend: The Tax Professional (2hrs)
- The Gig Economy (2hrs)
- The Taxpayer Advocate: What They Can and Can Not Do (1hr)
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- 2019 Tax Update (2hrs) (Sec 199-A in particular)

Kathy recently retired after 25 years with H&R Block and started her own practice, Puzzled By Taxes, LLC. She teaches tax CPE for National and State level organizations, including NATP, NAEA, and Webce.com, around the country.

Her prior careers as a USAF military police officer and as a police communications officer for the Bossier City Police give her a wide variety of experience that translate into tax issues. She proudly holds the titles of Enrolled Agent, Fellow NTPI, and United States Tax Court Practitioner.

She has been published by several tax research companies, including Parker Tax Publishing and TaxConnections.com. She is an accomplished speaker and instructor on a wide variety of tax issues.

Kathy lives and practices in the Shreveport Louisiana area and when not "talking tax" she enjoys spending time with her grandchildren and family, writing and reading.

## THE 14th ANNUAL CAROLINA CONNECTION

2019 CONVENTION and CE SEMINAR

Classes begin Sunday, May 19, 2019, at 4pm and end Tuesday, May 21, 2019, at 4:40pm.

Early Bird Special - by March 31, 2019:

- Register for CE by March 31, 2019 to be entered in a drawing to win your Spring 2019 CE Event Registration Fee.

- Register at the Hotel by March 31, 2019 to be entered in a drawing for 2 standard nights accommodations for May 20th and May 21st, 2019.

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

\_\_\_\_\_(P+8 digits)

\*Name as it appears on your PTIN registration card. PTIN as it appears on your PTIN registration card

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Designation - EA, CPA, Esq., Other: \_\_\_\_\_ Email: \_\_\_\_\_ @ \_\_\_\_\_

Phone #: \_\_\_\_\_ Fax #: \_\_\_\_\_

Education OPTIONS - You must choose between Representation Track or Tax Track.

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.

Participant	Register by April 30, 2019	Register after Your Cost April 30, 2019	Track Choice (circle one)	
NAEA Member:	\$375.00	\$400.00	_____	REP TAX
Non-NAEA Member:	\$475.00	\$525.00	_____	REP TAX
Member's Non-member				
Employee:	\$375.00 x _____ (# of employees)	\$400.00 x _____ (# of employees)		REP TAX
Extra Books (indicate Tax or Rep) (for Registered Attendees only)	\$50.00 x _____	(# of books) _____		REP TAX
		\$ _____	Total Cost	

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. You can do so via links at [www.scsea.org](http://www.scsea.org) or [ncseaonline.com](http://ncseaonline.com).

You may pay by **check or credit card**.

- Check – Send a check payable to "SCSEA" with your registration form to the address below.

- Credit card – via online registration.

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 \_\_\_ Brochure \_\_\_ EA Journal \_\_\_ Postcard \_\_\_ NAEA Member

\_\_\_ NAEA Website \_\_\_ NCSEA Website \_\_\_ Friend \_\_\_ Other

REGISTER ONLINE: [www.scsea.org](http://www.scsea.org) or [ncseaonline.com](http://ncseaonline.com)

Mail or Fax Applications to:

Refund Policy: For a full refund, all cancellations must be sent to Tom Sheaffer in writing by April 30, 2019.

SCSEA c/o Tom Sheaffer  
14 Waite St, Greenville, SC 29607  
Fax: 864-243-8924