



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



**THE 17th ANNUAL
CAROLINA CONNECTION
2022 CONVENTION and
CE SEMINAR**

**WELCOME BACK!
to beautiful Wrightsville Beach, NC!!**

When: May 24th to May 25th, 2022

Where: [Holiday Inn Resort, Wrightsville Beach, NC](#)

Why: Earn 16 hours of the best Continuing Education

We are offering 2 separate educational tracks.
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.

**Representation Track
With Frank Agostino, Esq.**

- Representing the Taxpayer with Inadequate Books & Records
- Penalty Abatements
- Representing the Taxpayer in a Trust
- Recovery Penalty Investigation
- Best Practices to Understand & Respond To Letters from Collections
- Best Practices for Drafting a Protest
- How to Represent a Taxpayer In a CDP Hearing
- How and When to Complain about An Overzealous Agent or Officer
- Evaluating When to Amend a Return, Enter into a Voluntary Disclosure, or Amend Going Forward
- NY vs Weisselberg and the Trump Organization

**Tax Track
With Ronald D. Powell, EA**

- Comprehensive Look at Schedule C
- Transferring a Sole Proprietorship
- Crypto Currency
- Court Cases
- Rentals & Royalties
- Financial Distress
- Trust Essentials 101
- Clergy Issues
- Surviving an IRS Audit

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.org and www.scsea.org.

CAROLINA EAs Re-CONNECT PROGRAM & SCHEDULE

Tuesday, May 24, 2022

7:00am – 8:00am Registration
8:00am – 11:50am Dual Track Classes (*with appropriate breaks*)
11:50am – 12:50pm Lunch
12:50pm – 1:50pm NC and SC Annual Meetings
1:50pm – 5:30pm Dual Track Classes (*with appropriate breaks*)

*Please use this evening to enjoy and explore
Wrightsville Beach and nearby Wilmington at your leisure.*

Wednesday, May 25, 2022

8:00am – 11:40am Dual Track Classes (*with appropriate breaks*)
11:40am – 12:40pm Lunch
12:40pm -- 4:50pm Dual Track Classes (*with appropriate breaks*)

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

Schedules are subject to change to accommodate speakers and announcements.

ACCOMMODATIONS

[Holiday Inn Resort Wrightsville Beach 1706 North Lumina Avenue,
Wrightsville Beach, NC 28480](#)

Nightly Room Rate: \$169.00 Standard room \$199.00 Oceanfront room

This special rate applies for nights of May 23-May26, 2022, and is available until **April 25th** or **until our block of rooms is filled**, whichever comes first. Access the [direct link here](#) to make your [room reservations online](#) or call 800-465-4329 and ask for group reservations (Group Code: NCSEA 2022).

The Holiday Inn Resort is excited to welcome NCSEA & SCSEA guests to the Holiday Inn Resort Wrightsville Beach NC. The caring & professional staff is at your service to make your stay memorable. Whether you are flying or driving in, the complimentary shuttle is available to pick-up or drop off at the Wilmington International Airport (ILM). You may schedule your flight times with the hotel's Bellman. The shuttle also drives around the island and as far away as Mayfaire Town Center, about 3-3.5 miles away.

The shuttle route encompasses plenty of restaurants, shopping, sightseeing and museums, spas and parks. Also, the Guest Activities desk can help with recommendations on where to eat and sites to enjoy. The hotel is only a fifteen minute drive to Wilmington for those who want to venture further.

The Tracks offered this year are either Representation OR Tax.

We will be unable to offer the splitting of tracks. Since space is limited in both tracks, please register early to guarantee your choice of tracks. Topics & speakers are subject to change.

Representation Track with *Frank Agostino, Esq.*

- *Representing the Taxpayer with Inadequate Books & Records
- *Penalty Abatements
- *Representing the Taxpayer in a Trust Fund Recovery Penalty Investigation
- *Best Practices to Understand & Respond To Letters from Collections

- *Best Practices for Drafting a Protest
- *How to Represent a Taxpayer in a CDP Hearing
- *How and When to Complain about an Overzealous/Over-aggressive Agent or Officer
- *Evaluating When to Amend a Return, Enter into Voluntary Disclosure, and/or Amend Going Forward
- *NY vs Weisselberg and the Trump Organization

FRANK AGOSTINO, ESQ., is the founder and president of *Agostino & Associates, P.C.* 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 Seton Hall University W. Paul Stillman School of Business and Rutgers School of Law. He also 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 *Taxpayers Assistance Corp.*, which provides tax and legal advice to low-income taxpayers in the NY/NJ area.

Tax Track with *Ronald D. Powell, EA*

- *Comprehensive Look at Schedule C
- *Transferring a Sole Proprietorship
- *Cryptocurrency
- *Court Cases
- *Clergy Issues

- *Rentals & Royalties
- *Financial Distress
- *Trust Essentials 101
- *Surviving an IRS Audit

RONALD D. POWELL, EA After serving in the US Air Force for 24 years, Ron retired as a Lieutenant Colonel in 2005 at Pope Air Force Base in North Carolina. In 1996, he purchased *Powell & Powell Accounting, Inc.* in Asheboro, NC from his father, Wade J. Powell, who established the firm in 1980. Ron says working with his dad for almost 10 years was one of the best times in his career. In April 2020, Ron retired from public practice and sold his firm, *Powell & Powell Accounting*.

Ron is a graduate of East Carolina University, BA, and a graduate of Webster University, MA, *summa cum laude*. He has more than 24 years of experience in accounting and tax preparation. He is enrolled to practice before the Internal Revenue Service (IRS) and has been presenting continuing education programs for over 16 years.

Ronald is a Past-President of the North Carolina Society of Accountants, a member of the National Society of Accountants (NSA), and a member of the National Association of Enrolled Agents (NAEA).

In 2017, Ron joined the national speaking team of *Professional Tax Institutes Inc.* and now travels around the United States providing IRS and NASBA approved continuing education for accountants and tax practitioners. Their "practitioner to practitioner" approach is unique and effective in providing CPE's to accountants, attorneys, CPAs, enrolled agents, CLUs, trust officers, and general tax preparers, regardless of years of experience.

He has been married to his wife, Latefa, since 1981. They have twins, Amanda and Robert. In 2020, Ron and Latefa fulfilled a life-long dream to live at the beach by moving to Ocean Isle Beach, NC, to further enjoy their retirement.

IRS Continuing Education information is available on the last page of this brochure.

Topics and speakers are subject to change. Please check back on the website for updated information.

**THE 17th ANNUAL CAROLINA CONNECTION
2022 CONVENTION and CE SEMINAR**

Classes begin Tuesday, May 24, 2022, at 8 am and end Wednesday, May 25, 2022 at 5:00 pm.

Early Bird Special - by March 31, 2022:

- Register for CE by **March 31, 2022** to be entered in a drawing to **win** your Spring 2022 CE Event Registration Fee.
- Register at the [Hotel](#) by **March 31, 2022** to be entered in a drawing for [2 standard nights' accommodations](#) for May 20 and May 21, 2022.

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 #: _____

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.

<u>Participant</u>	<u>Register by</u> April 25, 2022 PDF Copy of Book only	<u>Register after</u> April 25, 2022 PDF Copy of Book Only	<u>Your Cost</u>	<u>Track Choice</u> (circle one)
NAEA Member:	\$400.00	\$450.00	_____	REP TAX
Non-NAEA Member:	\$500.00	\$550.00	_____	REP TAX
Member's Non-member Employee:	\$400.00 x _____ (# of employees)	\$450.00 x _____ (# of employees)	_____	REP TAX
Additional pdf link (indicate Tax or Rep)		\$ 40.00	_____	REP TAX

(if you want a link to material from the track you are not attending- for Registered Attendees only.)

NO REFUNDS WILL BE GRANTED AFTER THE MATERIALS ARE SENT

\$ _____ **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.*

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 scan registration form to administrator@ncseonline.org.

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 scan or mail your payment and registration form to:
 or register & pay online at www.ncseonline.org. 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, 2022.

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



North Carolina Society of Enrolled Agents

IRS Approved Continuing Education Provider Number VNKSH

Approved courses for Spring 2022 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 2022 CE Event may earn up to 16 hours of IRS Continuing Education in both the Representation Track and Tax Track. We are unable to split tracks for the 2022 Spring CE Event.

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.

2022 NCSEA/SCSEA Annual Conference Representation Track 16 hours IRS Federal Tax Law
Presented by Frank Agostino, Esq. VNKSH-T-00218-22-I

Topics in this live-group, instructor-led Track include representing taxpayers with inadequate books and records; penalty abatements; representing the taxpayer in a Trust Fund recovery penalty investigation; best practices to understand and respond to letters from Collections; best practices for drafting a protest; representing a taxpayer in a CDP hearing; how and when to complain about an over-aggressive or overzealous agent or officer; and evaluating when to amend a return, enter into a voluntary disclosure, or amend going forward. The speaker will also present an interesting discussion on NY vs. Weisselberg and the Trump Organization.

2022 NCSEA/SCSEA Annual Conference TAX TRACK 16 hours IRS Federal Tax Law
Presented by Ronald D. Powell, EA VNKSH-T-00219-22-I

Sessions in this live-group, instructor-led Track include a comprehensive look at the Schedule C; tax implications of transferring a sole proprietorship; CryptoCurrency; rentals and royalties; financial distress and its impact on tax issues; basic trust essentials; clergy issues; and surviving an IRS audit. The session will also include a discussion of recent tax court cases and other court cases affecting tax law.