

**PSTAP 77<sup>th</sup> Annual Meeting**  
**June 9-12, 2024**  
**Cape May, New Jersey**

- I. CALL TO ORDER
- II. INVOCATION
- III. PLEDGE OF ALLEGIANCE
- IV. WELCOME BY PRESIDENT
- V. APPOINT SERGEANT-AT-ARMS –
- VI. APPOINT A CHAPLAIN –
- VII. APPOINT A PARLIAMENTARIAN –**Mary Lew Kehm, CPA**
- VIII. READING OF THE RULES –
- IX. APPOINTMENT OF COMMITTEES
  - A. CREDENTIALS-
  - B. RESOLUTIONS -
  - C. NOMINATING – **Neil Trama, PA**
- X. MINUTES OF THE 76<sup>th</sup> ANNUAL MEETING
- XI. PRESIDENT’S REPORT – **Thomas Ostrowski, CPA**
- XII. PRESIDENT ELECT’S REPORT – **Jeanette Trama, EA**
- XIII. FIRST VICE PRESIDENT’S REPORT – **Barbara Soltysiak, CPA**
- XIV. SECOND VICE PRESIDENT’S REPORT –**Andrew Piernock, ATP**
- XV. TREASURER’S REPORT – **Linda Chicano, CPA**
- XVI. SECRETARY’S REPORT –
- XVII. EXECUTIVE DIRECTOR’S REPORT – **Sherry L. DeAgostino**
  
- XVIII. COMMITTEE REPORTS
  - A. **PRESIDENT-ELECT – Jeanette Trama, EA**
    - 1. BY-LAWS
      - Co-Chair: Mary Lew Kehm, CPA**
      - Co-Chair: Barry Meyer, PA, EA**
    - 2. MEMBERSHIP/PUBLIC RELATIONS
      - Co-Chair: Barbara A. Soltysiak, CPA**
      - Co-Chair: Dawn Douglas, ATP**
    - 3. EXECUTIVE OFFICE OVERSIGHT
      - Chair: Jeanette Trama, EA**
    - 4. LEGISLATIVE
      - Co-Chair: Neil C. Trama, PA, EA**
      - Co-Chair: Richard Kelly, CPA**
    - 5. MONITORING STATE BOARD OF ACCOUNTANCY
      - Chair: Randy Brandt, CPA**
    - 6. LONG RANGE PLANNING
      - Chair: Jeanette Trama, EA**
  - B. **FIRST VICE PRESIDENT – Barbara Soltysiak, CPA**
    - 1. BUDGET AND FINANCE
      - Clare Shaw, CPA**
    - 2. PROFESSIONAL CONDUCT & GRIEVANCES

**Michael Davis, CPA**

3. COMMITTEE ON COOPERATION WITH IRS  
**Co-Chair: Frank Cellini, EA**  
**Co-Chair: Mary Lew Kehm, CPA**
4. COMMITTEE ON COOPERATION WITH PA DOR  
**Co-Chair: Maurice Brubaker, EA**  
**Co-Chair: James Tice, EA**
5. SCHOLARSHIP  
**Co-Chair: Joseph Ianni**

**C. SECOND VICE PRESIDENT - Barbara Soltysiak, CPA**

1. EDUCATION  
**Co-Chair: Paul J. Cannataro, CPA**  
**Co-Chair: James Tice, EA**
2. AUDIT COMMITTEE  
**Chair: H. Richard Neidermyer, CPA**
3. ANNUAL MEETING
  - **77<sup>th</sup> Annual Meeting (Ellen Cannataro, Joyce Huttman, Cindy Naugle, Mae Wagaman)**
  - **78<sup>th</sup> Annual Meeting**
4. TECHNOLOGY  
**Frank Cellini, EA – Website Chair**  
**Mary Lew Kehm, CPA – ListServ Chair**
5. NOMINATING  
**Chair: Neil C. Trama, PA**
6. PA ACCOUNTANT PAC  
**Chair: Barry Meyer, PA, EA**
7. HR Committee  
**Co-Chair: Penny Ann Erbe, EA**  
**Co-Chair: Clare Shaw, CPA**

XIX. ELECTION OF OFFICERS

XX. MEMORIAL SERVICE

XXI. CHAPTER PRESIDENT'S REPORTS

- A. Buxmont – George Bancroft, CPA
- B. Central – H. Richard Neidermyer, CPA
- C. Lehigh Valley – Colleen Krcelich, CPA
- D. Northeast – Philip Reid, CPA
- E. Philadelphia Tri-County – Amish Dhanak
- F. Southeast – Richard B. Kelly, CPA
- G. South Central – Thomas Mayer
- H. West Central – James S. Frederick, PA
- I. Western Pennsylvania – Aaron Perriello

XXII. OLD BUSINESS

XXIII. NEW BUSINESS

XXIV. GOOD & WELFARE

XXV. RESOLUTION COMMITTEE REPORT

XXVI. ADJOURNMENT

***Pennsylvania Society of Tax and Accounting Professionals***  
***76th Annual Meeting Minutes***

June 12–13, 2023

**I. Call to Order**

The Annual Meeting of the Pennsylvania Society of Tax and Accounting Professionals was called to order by Maurice Brubaker at 9:03 am on Monday, June 12, 2023, at the Hershey Lodge & Convention Center in Hershey, Pennsylvania.

**II. Invocation – Dawn Douglas**

**III. Pledge of Allegiance**

**IV. Welcome by President – Maurice Brubaker, EA**

**V. Sergeant-At-Arms appointed – Penny Erbe**

**VI. Chaplain appointed – Dawn Douglas**

**VII. Parliamentarian appointed – Mary Lew Kehm**

**VIII. Reading of the Rules – Deborah Mininger-Lahneman, EA**

**IX. Appointment of Committees**

**A. Credentials** – Deborah Mininger-Lahneman, EA

**B. Resolutions** – Ellen Cannataro

**C. Nominating** – Michelle A. Young, CPA

**X. Approval of the Minutes**

The minutes of the 75<sup>th</sup> Annual Meeting were presented.

**Motion:** To dispense with the reading of the minutes. 1<sup>st</sup> Mary Lew Kehm,  
2<sup>nd</sup> Frank Cellini

**Motion:** Passed

**Motion:** Motion to approve the minutes. 1<sup>st</sup> Andrew Piernock,  
2<sup>nd</sup> Richard Neidemeyer

**Motion:** Passed

**XI. President’s Report – Maurice Brubaker** – Report in the packet with comments.

- XII. President Elect's Report – Thomas Ostrowski** – Report in the packet with comments.
- XIII. First Vice President's Report – Jeanette S. Trama** – Report in the packet with comments.
- XIV. Second Vice President's Report – Barbara Soltysiak** – Report in the packet with comments.
- XV. Treasurer's Report – Linda Chicano** - Report in the packet with comments.
- XVI. Secretary's Report – Deborah Mininger – Lahneman** – Report in the packet.
- XVII. Executive Director's Report – Sherry L DeAgostino** - Report in the packet with comments.

**XVIII. Committee Reports – *Committee reports were presented with comments from the various chairs or others. Please refer to the 76<sup>th</sup> Annual binder for additional information.***

**A. President-Elect – Thomas Ostrowski, CPA**

- 1. By-Laws – Mary Lew Kehm, CPA & Barry Meyers, PA, EA** – Report in the packet
- 2. Membership/Public Relations – Barbara A. Soltysiak, CPA & Dawn Douglas, ATP** – Report in the packet
- 3. Executive Office Oversight – Maurice Brubaker, EA** – Report in the packet
- 4. Legislative – Neil C. Trama, PA, EA & Richard B. Kelly, CPA** - Report in the packet
- 5. Monitoring the State Board of Accountancy – Randy Brandt, CPA** – Report in the packet

**A. First Vice President - Jeanette S. Trama, EA**

- 1. Finance & Budget – Linda R. Chicano, CPA & James Tice, EA**  
Report in the packet
- 2. Professional Conduct & Grievances – Michael J Davis, CPA**  
No report presented
- 3. Committee on Cooperation with IRS – Francis Cellini, EA & Mary Lew Kehm, CPA** – Report in the packet
- 4. Committee on Cooperation with PA DOR – Maurice R. Brubaker, EA** – Report in the Packet
- 5. Scholarship** – Report in the packet

**B. Second Vice President – Barbara A. Soltysiak, CPA**

1. **Education – Paul J. Cannataro, CPA & James Tice, EA** – Report in the packet
2. **Audit Committee – H. Richard Neidermyer, CPA & Thomas Ostrowski, CPA** – Report in the packet
3. **Annual Meeting**
  - 77<sup>th</sup> **Annual Meeting** June 9-12, 2024 in Cape May, NJ
  - 78<sup>th</sup> **Annual Meeting** To be determined
  - 79<sup>th</sup> **Annual Meeting** To be determined
4. **Technology**
  - ListServ – Mary Lew Kehm, CPA** - Report in the packet
  - Website – Frank Cellini, EA** – Report in the packet
5. **Nominating Committee – Michelle Young, CPA –**  
The Nominating Committee Report was given by Michelle Young
6. **PA Accountant PAC – Barry Meyer, PA, EA** – Report in the packet
7. **HR Committee** – No activity and no report

**XIX. Election of Officers**

Michelle Young presented the slate of officers which was followed by the election. The following members were unanimously elected to office: :

Thomas Ostrowski – President  
Jeanette Trama – President-Elect  
Barbara Soltysiak – 1<sup>st</sup> Vice President  
Andrew Piernock – 2<sup>nd</sup> Vice President  
Linda Chicano – Treasurer  
Deborah Mininger-Lahneman - Secretary

**XX. Memorial Service – Conducted by Dawn Douglas**

Alan Liss	Buxmont	December 2021
Larry Spector	Philadelphia	May 2022
Mark Thomas	Western PA	July 2022
Joseph Romeo	Philadelphia	July 2022
Delbert Steeley (Deb Brubaker's father		July 2022
Kathleen Zaroff	Buxmont	April 2022
Thomas Dunchack	South Central	8/16/2021
Emil Frank Dzara, Jr.	Buxmont	1/18/2022
Gerard Woods	Philadelphia Tri County	10/5/2021

J. Kevin McCreesh	Southeast	2/23/1922
George Mylonas	Southeast	12/28/2021
Charlene Aepli	Central	12/17/2021
Paul Giordano	Buxmont	7/17/2021
Steve Caskey	West Central	10/1/22
Steven Buonomo	Buxmont	December 2022
Dave Shergalis	Southeast	January 7, 2023
Nicholas Tecco	Southeast	January 10, 2023
Aaron Martin	South Central	November 10, 2022
Dodd Pfeffer	Buxmont	12/21/2022
Steven Granoff	Philadelphia	2/12/23
Robert Frey	Lehigh Valley	3/1/23
John Kuhn	Lehigh Valley	4/28/23

**XXI. Chapter President's Reports**

- A. Buxmont – George Bancroft, CPA
- B. Central – H. Richard Neidermyer, CPA
- C. Lehigh Valley – Colleen Krcelich, CPA
- D. Northeast – Philip Reid, CPA
- E. Philadelphia Tri-County – Margaret Rovinski, CPA
- F. Southeast – Richard B. Kelly, CPA
- G. South Central – Thomas Mayer
- H. West Central – James S. Frederick, PA
- I. Western Pennsylvania – Aaron Perriello

**XXII. Old Business**

**XXIII. New Business**

**XXIV. Good & Welfare**

**XXV. Resolution Committee Report**

Ellen Cannataro presented the Resolution Committee report.

**XXVI. Adjournment**

The meeting adjourned at 11:15 a.m.

Minutes submitted by Deborah Mininger-Lahneman



## *77<sup>th</sup> ANNUAL MEETING*

### *PRESIDENT'S REPORT*

**TO:** PSTAP Board of Directors & Members

**FROM:** Thomas E. Ostrowski, CPA

**DATE:** June 2024

**Fellow PSTAP Board of Directors & Members:**

**I am honored to have served as President of the Pennsylvania Society of Tax & Accounting Professionals this past year and am pleased to present my PSTAP related/sponsored activities during the fiscal year ended June 30, 2024, as follows:**

- **June 28 – PA Tax Credits & Schedule G ~ West Central Chapter**
- **July 20 - Officer (Zoom) meeting**
- **August 16 – Estate Planning & Eldercare Matters / Ethics ~ Western PA Chapter**
- **August 17 – Claiming ERC in 2023 and Tidying Up ERC Claims Already Made webinar**
- **August 17 – Officer (Zoom) meeting**
- **September – Various communications with Audit and Budget & Finance Committees regarding the reviewed 6/30/2023 financial statements**
- **September 18 – Executive Committee (Zoom) meeting**
- **September 20 – Estates, Trusts and Planning for Tomorrow ~ South Central Chapter**
- **September 21 – Ethics – Tax Practice Standards ~ Central Chapter**
- **September 22 – Strategic Planning session**
- **September 23 – Board of Directors meeting**
- **September 27 – Schedule E Short Term Rentals webinar**
- **September 29 – How to Stay Secure on the Go with Your Phone webinar**
- **October 17 – Ethics & Estates ~ Lehigh Valley Chapter**
- **October 18 – Jennings Tax Speaker Business Tax Update ~ Northeast Chapter**
- **October 20 – Officer (Zoom) meeting**
- **October 25 – Novi AMS demo**
- **November 7 – PA Department of Revenue Fall Tax seminar**
- **November 16 – Your Membership AMS demo**
- **November 27 – Executive Committee (Zoom) meeting**

- December 1 – Budget & Finance Committee meeting
- December 2 – Board of Directors meeting
- December 12 – Year End Federal Tax Update & Planning w/Mary Lew ~ Buxmont, Philadelphia & Southeast Chapters (Joint)
- December 15 – Exhibitor Program (Zoom) meeting
- December 21 – Officer (Zoom) meeting
- January 2 – Education Committee (Zoom) meeting replay
- January 11-12 – Jennings Tax Speaker 1040 webinar
- January 18 – Officer (Zoom) meeting
- January 23 – IRS Updates w/Richard Furlong webinar
- January 29 – 2024 FinCen BOI Reporting webinar
- February 15 – Officer (Zoom) meeting
- April 19 – Officer (Zoom) meeting and website demo
- April 27 – Western PA After Tax Season Dinner Party
- May 1 – Executive Committee (Zoom) meeting
- May 3 – Budget & Finance Committee meeting
- May 3 – Strategic Planning session
- May 3 – Harrisburg Senators baseball game and picnic
- May 4 – Board of Directors meeting
- May 16 - Officer (Zoom) meeting
- May 31 - Officer (Zoom) meeting
- June 3-7 – Various communications, meetings and preparations in anticipation of the 77<sup>th</sup> Annual Meeting
- June 9-12 – 77<sup>th</sup> Annual Meeting in Cape May, NJ

I thank you all for your confidence, encouragement and support throughout this journey and very much look forward to remaining an active member of this great organization for many years to come.

Please do not hesitate to contact me at 724-942-4334 or [tom@deversonandtanack.com](mailto:tom@deversonandtanack.com) with any questions or comments.

Respectfully submitted,

*Thomas E. Ostrowski*

Thomas E. Ostrowski, CPA

President



## President-Elect's Report

June 9-12, 2024

To the Members of the Board:

It is with pleasure that I can report on the following activities. I attended the following meetings, events, and seminars:

- June 15 PSTAP Webinar – Richard Furlong
- June 29 Northeast Chapter Meeting
- July 20 Officer's Zoom Call
- August 17 Officer's Zoom Call
- September 18 Executive Committee Meeting
- September 22 Strategic Planning
- September 23 Board of Director's Meeting
- September 26 NE Chapter Seminar
- September 29 PSTAP Webinar
- October 18 NE Chapter Seminar
- October 20 Officer's Zoom Meeting
- October 24 Membership Committee Meeting
- November 21 Reviewed AMS Demo
- November 27 NE Chapter Committee Meeting
- November 28 – 29 NE Chapter Seminar
- December 1 Executive Committee Meeting
- December 1 Budget & Finance Committee Meeting
- December 2 Board of Director's Meeting
- December 14 Membership Meeting Zoom
- December 19 Lehigh Valley Chapter Xmas Party
- December 21 PSTAP Officer's Meeting
- December 28 Education Meeting Zoom
- January 18 PSTAP Officer's Meeting
- January 29 PSTAP Webinar
- February 5 PSTAP/NFIB Economic Forum
- March 21 PSTAP Officer's Meeting
- April 19 PSTAP Officer's Meeting
- May 1 Executive Committee Meeting
- May 3 PSTAP Strategic Planning
- May 4 Board of Director's Meeting
- May 16 PSTAP Officer's Meeting
- June 5 Day at the Capitol
- June 2023 – Present Various Email Exchanges

Respectfully submitted,  
Jeanette Trama



**BOARD OF DIRECTORS MEETING**  
**1st VICE PRESIDENTS REPORT**  
**JUNE 10, 2024**

To the Members of the Board:

I have attended the following meetings, events, and seminars:

- June 20 Lehigh Valley Social Event-Black River Farms Winery
- July 20 Officers Zoom Meeting
- August 1 Lehigh Valley Board Meeting(Zoom)
- August 17 Officers Zoom Meeting
- September 15 Finance Committee Virtual
- September 18 Executive Committee(Zoom)
- September 19 Lehigh Valley Board Meeting(Zoom)
- September 21 Pa Dept of Revenue Seminar
- September 22 Strategic Planning Session
- September 23 Board of Directors Meeting
- October 20 Officers Zoom Meeting
- October 24 Membership Committee Meeting
- November 8 & 9 Gear Up 1040 Seminar
- November 14 Lehigh Valley Board of Directors Meeting
- November 14 Lehigh Valley Chapter Meeting
- December 1 Budget and Finance Committee Meeting
- December 1 Executive Committee Meeting
- December 2 Board of Directors Meeting
- December 2 Philadelphia Holiday Party
- December 5 Lehigh Valley Chapter Meeting
- December 19 LV Holiday Party
- January 18 Line Officer Zoom Meeting
- February 15 Line Officer Zoom Meeting
- February 27 Lehigh Valley Board of Directors Meeting
- February 27 Lehigh Valley Chapter Meeting
- April 19 Line Officer Zoom Meeting

- April 26 Lehigh Valley Board Meeting
- May 1 Executive Committee Meeting
- May 3 Strategic Planning Session
- May 4 Board of Directors Meeting
- May 14 Lehigh Valley Board Meeting(Zoom)
- May 16 Line Officer Zoom Meeting
- May 21 Lehigh Valley Chapter Meeting
- May 31 Line Officer Zoom Meeting
- June 5 PSTAP Day at the Capital
- June 9 Nominating Committee Meeting

*Respectfully submitted,*

*Barbara Ann Soltysiak, CPA*  
*PSTAP 1st Vice President*

File Number: PSTAP – Annual Meeting 2024

June 10, 2024:

Re: PSTAP Board Report September 21, 2023

My activity July 2023 to June 2024

July 20, 2023	Attend Officer Board Zoom Meeting
Aug 18, 2023	Attend Officer Board Zoom Meeting
Aug 18, 2023	.Zoom Meeting to discuss Joint meeting for Dec 12 <sup>th</sup> Seminar.
Aug 18,19, 21, 2023	Review various e-mails regarding Dec 12 <sup>th</sup> Seminar
Aug 30, 2023	Attend Phila Chapter Board Zoom Meeting
Sept 18, 2023	Attend Executive Board Zoom Meeting
Sept 19, 2023	Attend Ethics and Divorce Taxation Seminar Springfield CC.
Sept 22, 2023	Attend the Strategic Planning Meeting, Harrisburg, PA
Sept 21, 2023	Attend Philadelphia Tax Advisory Committee Meeting.
Oct 20, 2023	Attend Board Zoom Meeting
Oct 24, 2023	Attend Membership Committee Meeting.
Nov 2, 2023	Attend PA Dept of Revenue Fall Tax Seminar.
Nov 14 & 15, 2023	Attend Jenings Tax 1040 Seminar..
Nov 16, 2023	Attend PSTAP AMS Demo.
Dec 1, 2023	Attend Executive Board Meeting.
Dec 1, 2023	Attend PSTAP Budget Metting.
Dec 2, 2023	Attend the PSTAP Board Meeting.
Dec 2, 2023	Attend the Phila Chapter Annual Holiday Party.
Dec 12, 2023	Attend the Phila Chapter Year-End Seminar with Mary Lew Keim.
Dec 13, 2023	Attend a Retirement Dinner for Frank Breslin, Phila Revenue Commissioner at Poppi's Restaurant. Sponsored by the Phila Chapter.
Dec 14, 2023	Attend the PSTAP Verifyle Demo.
Dec 21, 2023	Attend the PSTAP Executive Board Meeting.
Dec 28, 2023	Attend the PSTAP Education Committee Meeting.
Dec 28, 2023	Attend the Phila Chapter Education Committee Meeting.
Jan 1, 2024	Marched in the Philadelphia Mummies Parade, my 64 <sup>th</sup> Parade.
Jan 3, 2024	Attend the Phila Dept of Revenue Zoom Mtg regarding Tax Preparers and Tax Payers issues with the new System.
Jan 9 to 25 2024	Review, write and send various emails to Speakers and Springfield Country Club regarding re-scheduling the Phila and Local Tax Seminar.
Jan 18, 2024	Attend the PSTAP Officer Zoom Meeting.
Feb 15, 2024	Attend the PSTAP Officer Zoom Meeting.

Apr 18, 2024           Chaired the Phila Chapter Education Committee Meeting  
May 1, 2024           Attend the PSTAP Budget Meeting.  
May 2, 2024           Attend the Philadelphia Board Meeting.  
May 3, 2024           Attend the PSTAP Strategic Planning Session.  
May 3, 2024           Attend the Harrisburg Senators Ball Game,  
May 4, 2023           Attend the PSTAP Board Meeting  
May 16, 2024          Attend Phila Chapter Board Meeting.  
May 29, 2024          Attend the Philadelphia Tax Advisory Committee Meeting.  
May 31, 2024          Attend PSTAP Officer Zoom Meeting.  
May 2024              Review various e-mails regarding Phila Upcoming Seminars.  
June 4, 2024          Attended Phila Chapter Ethics and Retirement Seminar.  
June 9, 2024          Attend the Opening of the Annual Convention.

Respectfully Submitted,

*Andrew J. Piernock, Jr.*  
2<sup>nd</sup> Vice President - PSTAP

123 West Ritner Street  
Philadelphia PA 19148

Office: 267.318.7510  
Fax: 215.689.1551  
Email: AndyPier54@gmail.com





## TREASURER'S REPORT

June 10, 2024

September 23, 2023

The treasurer prepared the June 30, 2023 year end financial statements and presented them to the Board. The Reviewed Financial Statements, prepared by George Fieo, CPA, were presented in draft form. The IRS Working Together account is in excess of \$38,000, therefore, the reviewer, George Fieo, proposed booking it on the Financial Statements. It was not presented in the report in the past, except in a footnote. George corrected the balance sheets for the previous 2 years with a footnote to explain, as well as heading the previous two years with "Restated." Financial Reports as of June 30, 2023. The statements were deferred until the December meeting due to some questions about the footnotes.

December 2, 2023

The treasurer prepared and presented financial statements for October 31, 2023. She also attended the Budget and Finance Committee meeting to prepare the budget for 2024-2025.

The treasurer presented the 990 as prepared by James Tice.

May 4, 2024

The treasurer presented the 2024-2025 Budget to the Board, as well as the March 31, 2024 financial statements.

The PSTAP has moved to a new website, and has moved the record keeping to Quickbooks Online.

Sincerely,

Linda Chicano

## PSTAP MEMBERSHIP REPORT - FYE Comparison Report

STATEWIDE																				
Annual Meeting	56	57	58	59	60	61	62	63	64	65	66	67	68	69	70	71	72	75	76	77
Year	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2022	2023	2024
ACTIVE	1279	1317	1430	1424	1416	1446	1418	1440	1502	1642	1654	1691	1791	1714	1667	1704	1667	1383	1450	1426
RETIRED	50	52	48	43	39	41	36	31	31	27	28	28	23	20	21	24	29	24	27	24
ASSOCIATE	63	65	56	63	63	57	59	56	61	63	58	56	65	63	58	56	50	16	54	60
STUDENT	7	13	13	17	11	9	9	7	21	58	70	88	93	132	167	181	170	186	196	82
LIFE	18	18	19	20	20	22	23	24	23	24	25	26	24	24	24	24	24	25	26	26
<b>MEMBERS</b>	<b>1418</b>	<b>1467</b>	<b>1568</b>	<b>1569</b>	<b>1551</b>	<b>1577</b>	<b>1545</b>	<b>1560</b>	<b>1640</b>	<b>1801</b>	<b>1838</b>	<b>1890</b>	<b>1998</b>	<b>1955</b>	<b>1938</b>	<b>1990</b>	<b>1941</b>	<b>1666</b>	<b>1753</b>	<b>1618</b>

BUXMONT																				
Annual Meeting	56	57	58	59	60	61	62	63	64	65	66	67	68	69	70	71	72	75	76	77
Year	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2022	2023	2024
<b><u>TOTAL</u></b>	<b><u>398</u></b>	<b><u>415</u></b>	<b><u>438</u></b>	<b><u>440</u></b>	<b><u>441</u></b>	<b><u>446</u></b>	<b><u>435</u></b>	<b><u>432</u></b>	<b><u>444</u></b>	<b><u>464</u></b>	<b><u>456</u></b>	<b><u>449</u></b>	<b><u>471</u></b>	<b><u>459</u></b>	<b><u>434</u></b>	<b><u>457</u></b>	<b><u>447</u></b>	<b><u>357</u></b>	<b><u>360</u></b>	<b><u>324</u></b>
Active	366	380	404	408	410	418	406	404	414	431	423	415	433	415	393	413	402	319	319	296
Retired	9	7	7	5	6	6	6	7	7	9	9	9	6	5	4	6	9	5	6	6
Associate	19	21	20	21	20	17	17	16	18	17	17	17	23	23	21	21	18	16	16	15
Student	1	4	3	3	2	2	3	2	2	3	3	4	5	12	13	14	15	14	15	3
Life	2	2	2	2	2	2	2	2	2	3	3	4	3	3	3	3	3	3	4	4

CENTRAL																				
Annual Meeting	56	57	58	59	60	61	62	63	64	65	66	67	68	69	70	71	72	75	76	77
Year	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2022	2023	2024
<b><u>TOTAL</u></b>	<b><u>130</u></b>	<b><u>127</u></b>	<b><u>124</u></b>	<b><u>138</u></b>	<b><u>136</u></b>	<b><u>136</u></b>	<b><u>142</u></b>	<b><u>141</u></b>	<b><u>142</u></b>	<b><u>153</u></b>	<b><u>153</u></b>	<b><u>150</u></b>	<b><u>176</u></b>	<b><u>176</u></b>	<b><u>172</u></b>	<b><u>178</u></b>	<b><u>179</u></b>	<b><u>162</u></b>	<b><u>182</u></b>	<b><u>171</u></b>
Active	116	111	110	122	121	121	128	127	131	139	141	133	158	157	151	155	162	141	160	156
Retired	4	6	6	6	4	4	3	2	1	0	0	1	1	1	2	2	1	1	2	0
Associate	6	6	5	7	8	8	7	7	7	7	4	6	8	8	8	9	7	7	6	6
Student	1	1	0	0	0	0	0	0	0	4	5	7	6	7	8	9	7	11	12	7
Life	3	3	3	3	3	3	4	4	3	3	3	3	3	3	3	3	2	2	2	2

## LEHIGH VALLEY

Annual Meeting	56	57	58	59	60	61	62	63	64	65	66	67	68	69	70	71	72	75	76	77
Year	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2022	2023	2024
<b>TOTAL</b>	<u>158</u>	<u>168</u>	<u>183</u>	<u>190</u>	<u>195</u>	<u>203</u>	<u>197</u>	<u>199</u>	<u>212</u>	<u>229</u>	<u>230</u>	<u>234</u>	<u>242</u>	<u>242</u>	<u>237</u>	<u>244</u>	<u>241</u>	<u>220</u>	<u>211</u>	<u>219</u>
Active	140	149	167	170	174	181	178	183	195	208	209	215	222	215	206	213	213	190	179	190
Retired	6	7	7	7	4	7	6	3	4	2	1	1	1	2	2	2	3	4	4	3
Associate	9	9	6	9	10	10	9	8	9	12	11	8	5	9	8	7	6	7	7	8
Student	0	0	0	1	1	1	0	1	1	4	6	7	11	13	17	18	15	15	17	14
Life	3	3	3	3	3	3	4	4	3	3	3	3	3	3	4	4	4	4	4	4

## NORTHEAST

Annual Meeting	56	57	58	59	60	61	62	63	64	65	66	67	68	69	70	71	72	75	76	77
Year	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2022	2023	2024
<b>TOTAL</b>	<u>136</u>	<u>142</u>	<u>147</u>	<u>148</u>	<u>145</u>	<u>153</u>	<u>148</u>	<u>158</u>	<u>168</u>	<u>197</u>	<u>190</u>	<u>207</u>	<u>201</u>	<u>196</u>	<u>213</u>	<u>214</u>	<u>212</u>	<u>189</u>	<u>187</u>	<u>156</u>
Active	122	128	137	136	135	144	141	153	163	188	181	196	189	173	169	168	166	140	136	131
Retired	3	3	3	3	3	4	2	1	1	1	1	1	1	1	0	0	0	0	0	1
Associate	10	10	6	7	5	4	4	3	3	3	3	4	4	4	3	3	3	2	3	5
Student	0	0	0	1	1	0	0	0	0	4	4	5	6	17	40	42	42	46	27	18
Life	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1

## PHILADELPHIA TRI COUNTY

Annual Meeting	56	57	58	59	60	61	62	63	64	65	66	67	68	69	70	71	72	75	76	77
Year	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2022	2023	2024
<b>TOTAL</b>	<u>215</u>	<u>220</u>	<u>238</u>	<u>215</u>	<u>204</u>	<u>201</u>	<u>196</u>	<u>198</u>	<u>227</u>	<u>253</u>	<u>273</u>	<u>278</u>	<u>304</u>	<u>281</u>	<u>288</u>	<u>303</u>	<u>291</u>	<u>244</u>	<u>251</u>	<u>233</u>
Active	182	184	204	184	178	179	173	175	196	208	230	229	258	234	240	252	242	195	200	204
Retired	14	13	12	11	9	9	8	8	8	8	9	8	5	5	6	6	7	5	5	5
Associate	13	13	12	9	10	6	7	8	9	9	6	8	8	7	5	6	6	3	6	10
Student	3	6	5	6	2	2	4	1	8	20	22	28	28	30	32	34	31	36	35	9
Life	3	3	4	4	4	4	4	5	5	5	5	5	4	4	4	4	4	5	5	5







# Committee Activity Summary for Bylaws & Governance Committee

Submitted By: Mary Lew Kehm

Date: 06/04/2024

Committee Activity from 07/01/23 through 06/04/24

Committee Had No Activity (Check this only if the committee did not meet and/or no work was done by committee)

Date	Location	Attendees	Issues/Recommendations/Topics Discussed	Action Required	Time Table
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Various consultations regarding governance and bylaws.

## Membership Committee Report

Annual Meeting – June 2024

We were encouraged by the membership statistics shared by Sherry last fall. However, we still have to continue to look for ways to promote our organization with the goal of increasing our membership.

The committee is proud that many items from the Strategic Plan were completed. The most visible was the infographic. It has become a good tool for the organization. Besides this new tool for reaching prospective member, the Starbucks and Candy Jar recognition programs are being used to encourage existing members

A way each chapter can help is by allotting some time for testimonials and sharing the benefits of membership at their chapter meetings.

We will have a meeting, in the near future, to discuss the items brought up at our most recent strategic planning session this past May and to review new capabilities available to our committee with the launching of our new website.

Respectfully submitted,

Barb Soltysiak, co-chair

Dawn Douglas, co-chair

# Committee Activity Summary for Executive Director's Oversight

Submitted By: Jeanette Trama

Date: June 2024

Committee Activity from 6/15/2023 through 6/10-11/2024

Committee Had No Activity (Check this only if the committee did not meet and/or no work was done by committee)

Date	Location	Attendees	Issues/Recommendations/Topics Discussed	Action Required	Time Table
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## LEGISLATIVE COMMITTEE

### State Board Meeting Report

### 7/1/23 to 6/9/24

Attended monthly meetings with lobbyist firm:

7/27/23

8/25/23

9/29/23

10/26/23

1/31/24

2/27/24

3/26/24

5/28/24

Attended Day at the Capitol June 5, 2024

SALT limitation workaround for pass-through entities SB(659) is moving along, See the attached amendment

HB(1582) has been introduced:

An Act amending the act of March 4, 1971 (P.L.6, No.2), known as the Tax Reform Code of 1971, in personal income tax, further providing for definitions, providing for elective tax imposed at pass-through entity level and further providing for taxability of partners, for income of a Pennsylvania S corporation and for income taxes imposed by other states.

**Richard Kelly at 610-388-9700**

**Check the PSPA Web Site at [www.pstap.org](http://www.pstap.org)**

Respectfully Submitted,

Richard B. Kelly, Committee Co-Chair PSTAP

# LEGISLATIVE ANNUAL MEETING REPORT

**JUNE 10, 2024**

During the past year we have had monthly conference calls with Saxton & Stump. Sam Morris joined Sarah Moreland and sends us updates on various legislation.

Some of the bills we have taken a formal position on:

1. Wrote a letter of support to end the prepayment requirement for sales and use tax. - HB 1404
2. We were actively involved in the Tele filing phase out to keep an option open.
3. Supported HB 659-SALT CAP work around.
4. Supported SB 815 regarding Grantor Trusts sponsored by Lisa Baker.
5. SB 77 Family Exemption of Inheritance Tax up to \$100,000.
6. HB 2119 Exempt Rollovers from PA 529 Plans to Roth IRAs.
7. SB 1051 permits the Board of Finance and Revenue to consider late filed appeals.

Other Actions:

Participated in economic forum with NFIB on February 5, 2024 to discuss common issues we can work together on.

Organized and participated in the Day at the Capital held on June 5<sup>th</sup>.

Submitted by:



Neil C. Trama  
Co-Chairman

# Committee Activity Summary for Stratgic Planning Committee

Submitted By: Jeanette Trama

Date: June 2024

Committee Activity from 6/14/2023 through 6/10-11/2024

( ) Committee Had No Activity (Check this only if the committee did not meet and/or no work was done by committee)

Date	Location	Attendees	Issues/Recommendations/Topics Discussed	Action Required	Time Table
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The Strategic Planning Meeting took place on September 22, 2023 focusing on education with Nancy Chavez as the facilitator.

An email was sent out on to all of the State Board members, Chapter Board members and Chapter Education Committee members inviting them to the meeting.



# Clare M. Shaw, CPA

Accounting, Taxation, Insurance, Investment Services\*

Luxembourg Corporate Center  
202 Corporate Drive East  
Langhorne, Pennsylvania 19047  
Tel: 215-860-1199  
Fax: 215-860-1003

PSTAP Board of Directors  
150 Corporate Center Drive  
Camp Hill, Pennsylvania 17011

June 10, 2024

The following is a recap of the activities of the Budget and Finance Committee for the period of July 2023 through June 2024.

## **September 2023**

At this time of year, the Committee is responsible for the initial evaluation of the Review Report for the fiscal year ending June 30, 2023. The Review Report was prepared by George Fieo CPA, CFE. A few questions were raised by the Executive Committee and George was unavailable to answer those questions at the time of the Executive Committee's meeting. The Report was presented to the Board of Directors for discussion. Acceptance of the Report was deferred to the December 2023 Board of Directors meeting.

## **December 2023**

The Finance and Budget Committee met on December 1, 2023 to discuss a preliminary budget for 2024 – 2025. However, the Board of Directors' meeting was held December 2, 2023 and the report was not ready for presentation. It was presented to the Executive Committee on May 1, 2024 for discussion and will be presented to the Board of Directors on May 4, 2024.

The June 30, 2023 fiscal yearend Review Report was presented to the Board of Directors and approved.

## **May 4, 2024**

The Committee held a virtual meeting as well as discussions via email to discuss a few budget items that required additional attention. A discussion also took place at the Executive Committee meeting on May 1, 2024 and all questions were answered. The Treasurer, Linda Chicano CPA, presented the budget to the entire Board of Directors on May 4, 2024. The budget was accepted as presented.

Committee Members  
Linda Chicano CPA, Treasurer  
Clare M. Shaw CPA, Chair  
Barbara Ann Soltysiak CPA  
Thomas E. Ostrowski CPA  
James F. Tice EA  
Jeanette S. Trama EA  
Andrew J. Piernock ATP

\*Clare M. Shaw is a Registered Representative offering securities through Avantax Investment Services<sup>SM</sup>, Member FINRA, SIPC. Investment advisory services offered through Avantax Advisory Services<sup>SM</sup>. Insurance services offered through an Avantax affiliated insurance agency.



# COMMITTEE ON COOPERATION WITH IRS Annual Meeting Report For June 2024

My activities were the following:

## **\*\* Board Meeting Report For September 23, 2023**

- June 15, 2023 attended Richard Furlong tax update web Meeting
- August 2, 2023 attended Teams Meeting with IRS Liaison **Subject:** [EXT] C&L Listening Session #2 TAX PROS
- Info recently received from IRS stakeholder

## **\*\* Board Meeting Report For December 2, 2023**

- The Internal Revenue Service has released [Notice 2023-74](#) announcing a delay of the new \$600 Form 1099-K reporting threshold for third-party settlement organizations for calendar year 2023.
- As the IRS continues to work to implement the new law, the agency will treat 2023 as an additional transition year. This will reduce the potential confusion caused by the distribution of an estimated 44 million Forms 1099-K sent to many taxpayers who wouldn't expect one and may not have a tax obligation. As a result, reporting will not be required unless the taxpayer receives over \$20,000 and has more than 200 transactions in 2023.
- IR-2023-193, Oct. 19, 2023

WASHINGTON – As part of a larger effort to protect small businesses and organizations from scams, the Internal Revenue Service today announced the details of a special withdrawal process to help those who filed an Employee Retention Credit (ERC) claim and are concerned about its accuracy.

This new withdrawal option allows certain employers that filed an ERC claim but have not yet received a refund to withdraw their submission and avoid future repayment, interest and penalties. Employers that submitted an ERC claim that's still being processed can withdraw their claim and avoid the possibility of getting a refund for which they're ineligible.

The IRS created the withdrawal option to help small business owners and others who were pressured or misled by ERC marketers or promoters into filing ineligible claims. Claims that are withdrawn will be treated as if they were never filed. The IRS will not impose penalties or interest.

### **\*\* Board Meeting Report For May 4, 2024**

- 4/24/2024 Attended working together teams meeting. Working Together is scheduled for Thursday May 30, 2024 at Penn State – Great Valley.
- A practitioner liaison meeting will be scheduled in May 2024
- Be informed. Sign up for IRS e-News for Tax Professionals

### **\*\* Annual Meeting June 2024**

- Moderator for the Taxpayer Advocates Panel at the Eastern Working Together Seminar on May 30, 2024

Respectfully Submitted,  
Francis J. Cellini EA ABA ATA ATP

# Committee Activity Summary for Cooperation with IRS (Member Communication)

Submitted By: Mary Lew Kehm

Date: 06/04/2024

Committee Activity from 07/01/23 through 06/04/24

( ) Committee Had No Activity (Check this only if the committee did not meet and/or no work was done by committee)

Date	Location	Attendees	Issues/Recommendations/Topics Discussed	Action Required
			<p>Issues discussed with Richard Furlong, IRS Stakeholder Liaison. Communication regarding ERC and posting to Practitioner Tool Kit.</p> <p>I was in email and telephone contact with Richard Furlong several times. Communicated with members and state office via listserv and other means.</p>	
8/2/2023	Teams		IRS Demo presentation of InForm Me app	Prototype mobile phone app for taxpayer info on forms and notices. No personal information would be captured.
4/24/2024	Teams		Attended organizational meeting regarding Eastern Working Together conference.	



**To: PSTAP Board of Directors**

**From: Joseph P. Ianni**  
**Chairman, Scholarship Committee**

**RE: Scholarship Committee Report**

**Date: June 9, 2024**

- The Scholarship Committee held a Zoom Meeting on Wednesday, November 29, 2023 to review the scholarship applications and chose the recipients for this year.
- The scholarship recipients for 2023-24 were notified by our Executive Office immediately following our meeting.
- The 2023-2024 scholarship recipients are:
  1. Seth Robertson – Waynesburg University - \$3,000 Zaleski Scholarship
  2. Lauren Coccia – Northampton College - \$2,000 PSTAP Scholarship
  3. Claire Stoner – Duquesne University - \$2,000 PSTAP Scholarship
- There has been no other Scholarship Committee activity since our last Board Meeting.
- It has been a pleasure to serve as the Chairman of the Scholarship Committee this past year. Thank you to the Executive Office and the other members of the Committee for your time and commitment to the selection process.

Respectfully submitted,

*Joseph P. Ianni*

Joseph P. Ianni  
Chairman, Scholarship Committee, PSTAP

**EDUCATION COMMITTEE**  
**CO-CHAIR REPORT FROM JAMES TICE**  
**77<sup>th</sup> ANNUAL MEETING**  
**JUNE 2024**

As we navigate through another year of challenges, the unwavering commitment and resilience of our committee members continues to inspire us all. Our collective dedication to the pursuit of excellence in education sustains and propels us forward. This report aims to shed light on our ongoing efforts, our triumphs amidst trials, and our relentless pursuit of providing high-quality education for all. We hope that it not only informs but also inspires you about the work we do and the difference we make every day.

A strategic planning session was held on 9/22/23. We discussed how well events are working and making sure the number of people attending are enough. We need to focus on increasing attendance. Chapter meetings need to be sustainable. Alternative meeting locations other than hotels should be explored for opportunities to save costs. Social activities and shredding events may help drive attendance. Chapter-wide co-sponsored programs can be held as revenue sharing events.

A strategic planning session was held via Zoom on 12/4/23 and 12/28/23. We discussed topics and CPE content delivery (In-person/online/hybrid), challenges in competitive pricing, and draft seminar cancellation policies. PSTAP will continue to piggy-back online courses from TaxSpeaker and provide revenue-sharing with the Chapters.

Simulcasts at Tax Speaker events will be allowed, and we need consistency in delivery for this option. Utilizing a simulcast option will pose challenges. We need to be profitable at events. We need to have quality equipment. It would take personnel to run video and polling monitoring. The facilities must have good WiFi. In short, we would need to avoid technical issues.

There are changing demographics, costs, and consumer demand patterns.

Statistics from 2015 through 2023 PSTAP seminars were reviewed. Attendance for the A&A and Business Entities events have declined to almost half their levels since 2015. The overall 1040 attendance has declined. The PA DOR and Ethics events seem to be holding.

Co-sponsored events may be held as revenue sharing events to make meetings sustainable. Alternative meeting locations other than hotels should be explored for opportunities to save costs. Integrating a social or a shredding event may help drive attendance. We are discussing “bundle discount” registrations as a way to drive members to 1040 and other events.

It is important to develop programs and speakers

Topic ideas and potential speakers are always appreciated, and I welcome input from every chapter. A blend of topics is needed to provide a balance of educational requirements and options to the members.

Respectfully Submitted,  
James F. Tice, EA

## Activities Completed:

7/11/23 South-Central BOD Meeting  
7/20/23 PSTAP Officer Call regarding strategic planning  
7/29/23 Lehigh Valley Chapter Iron Pigs Baseball Game Social Event  
8/16/23 West Central Chapter Presenter on Choice of Entity Tax Considerations & Depreciation-Understanding Changes  
9/18/23 PSTAP State Executive Committee Zoom Meeting  
9/19/23 Philadelphia Chapter Presenter on Ethics: Tax Practice Standards & Marriage and Divorce Tax Planning  
9/21/23 Central Chapter Presenter on Ethics: Tax Practice Standards  
9/22-9/23 PSTAP Strategic Planning and BOD Meeting  
10/18/23 South Central Chapter Presenter on Marriage & Divorce Tax Planning and Ethics: Tax Practice Standards  
10/23/23 PSTAP State Webinar Presenter on Federal Gift Tax: Preparing Form 709  
10/29/23 Coordinator for Trunk or Treat Event at Saint Paul Lutheran Church  
11/7/23 Preparation of South-Central Chapter PSTAP Form 990  
11/8/23 South Central Chapter Presenter on Depreciation: Understanding Changes  
11/9/23 PA DOR Committee planning session at Brinker Simpson & Company LLC in Media, PA  
11/14/23 Central Chapter Presenter on Form 1023 Application for 501-C-3 Tax Exempt Status and Form 990 Not-For-Profit Tax Return  
11/22/23 Preparation of State PSTAP Form 990 and BCO filings  
11/30/23 PSTAP State Webinar Presenter on Ethics & Circular 230  
12/1/23 PSTAP State Executive Committee Zoom Meeting and Finance Committee Meeting at PSTAP State office  
12/2/23 PSTAP State BOD Zoom Meeting  
12/4/23 PSTAP State Education Committee Zoom Meeting  
12/5/23 Replay of 11/30/23 PSTAP State Webinar Presenter on Ethics & Circular 230  
12/7 & 12/8 Joint Central/South Central Gear-Up 1040 Seminar  
12/14/24 PA DOR Annual Meeting  
12/28/24 PSTAP State Education Committee Zoom Meeting  
1/9/24 York-Adams Tax Bureau Annual Tax Preparer Webinar  
1/16/24 PSTAP State Webinar Presenter on Social Security: Maximizing Benefits  
1/24/24 PSTAP State Webinar Presenter on Tax Credits: Individuals  
1/24/24 PSTAP State Webinar Presenter on Tax Credits: Business  
5/3 & 5/4 PSTAP State Strategic Planning and BOD Meeting  
5/21/24 Central Chapter Presenter on Social Security and Tax Credits  
6/4/24 Philadelphia Chapter Presenter on Planning During Retirement & Ethics  
6/9 – 6/12 PSTAP 77<sup>th</sup> Annual Meeting



# Committee Activity Summary for AUDIT COMMITTEE

Submitted By: H RICHARD NEIDERMYER CPA

Date: JUNE 10, 2024

Committee Activity from 7 / 1 / 2023 through 6 / 10 / 2024

( ) Committee Had No Activity (Check this only if the committee did not meet and/or no work was done by committee)

Date	Location	Attendees	Issues/Recommendations/Topics Discussed	Action Required	Time Table
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The Review of our financial statements for the fiscal year ended June 30, 2023 was completed by George Fieo of Peterson, Fieo and Co., LLP. The report was approved by the board at the September 23, 2023 board meeting. The Audit Committee has been informed by George Fieo that doing the Review for fiscal year ended June 30, 2024 will be the last year for him doing the Review for us. There was no other activity by the committee during the year.





# TECHNOLOGY COMMITTEE

## Annual Meeting Report

### For June 2024

My activities were the following:

#### **\*\* Board Meeting Report For September 23, 2023**

My activities were the following:

- Please refer to Sherry's report concerning the organizations management software choice.

#### **\*\* Board Meeting Report For December 2, 2023**

My activities were the following:

- Please refer to Sherry's report concerning the organizations management software choice.
- Attended software demo 11/16/2023

#### **\*\* Board Meeting Report For May 4, 2024**

My activities were the following:

- On 3/15/2024 Sherry sent an update on the progress of the AMS Project.
- Possible demo at this May 2024 board meeting.

Respectfully Submitted,

Francis J. Cellini  
Chairman  
Web Site Design  
Pennsylvania Society of Tax and Accounting Professionals

# Committee Activity Summary for Email List (Listserv) Technology Committee

Submitted By: Mary Lew Kehm

Date: 06/04/24

Committee Activity from 07/01/2023 to 06/04/2024

( ) Committee Had No Activity (Check this only if the committee did not meet and/or no work was done by committee)

Date	Location	Attendees	Issues/Recommendations/Topics Discussed	Action Required	Time Table
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Ongoing monitoring of email list. Periodic Tips have been posted. Ongoing

There are 819 email addresses on the list. 517 receive each email and 302 receive the digest. (This is a small decrease).

Time has been spent monitoring and administering the list. Thanks to Maurice Brubaker for assistance in judging appropriateness of posts.

Annual Popular Topics		
Topic	Posts	Last Post
Erc	27	312 days ago
PA "notices"	22	29 days ago
Why did you upgrade to a tier 1 tax prep software?	21	253 days ago
PA payment issue	21	29 days ago
Sale of a Compound	17	241 days ago
Client received a letter from Revenue Collection	17	160 days ago
FYI: BOI Reporting Open	17	148 days ago
PA PIT Penalty Waivers	17	34 days ago
PA UTMA Under cutoff- filing requirement PA?	16	105 days ago
Montco Resident-receives 1099NEC Phila	16	98 days ago

THE PENNSYLVANIA ACCOUNTANT

PAC ACCOUNT

CHECKING-PNC

FOR THE PERIOD ENDING MAY 31, 2024

05/31/2023	PAYMENTS	20,600.21
06/23/2023	556.80	
06/23/2023	4,878.62	
06/23/2023	5.00	
	-----	
	5,440.42	
APRIL 30, 2024		15,159.79
MAY 31, 2024		15,159.79

Barry L. Meyer PA. EA.

# Non-Profit Checking

PNC Bank



For the Period 05/01/2024 to 05/31/2024

Primary Account Number: 50-0561-1284

Page 1 of 1

Number of enclosures: 0

THE PENNSYLVANIA ACCOUNTANT  
PAC  
236 S HANOVER ST  
CARLISLE PA 17013-3944

For 24-hour banking sign on to  
 PNC Bank Online Banking on pnc.com  
FREE Online Bill Pay

For customer service call 1-877-BUS-BNKG  
PNC accepts Telecommunications Relay Service (TRS)  
calls.  
Para servicio en español, 1-877-BUS-BNKG

**Moving?** Please contact your local branch

Write to: Customer Service  
PO Box 609  
Pittsburgh, PA 15230-9738

Visit us at PNC.com/smallbusiness

## Non-Profit Checking Summary

Account number: 50-0561-1284

The Pennsylvania Accountant  
PAC

Overdraft Protection has not been established for this account.  
Please contact us if you would like to set up this service.

## Balance Summary

Beginning balance	Deposits and other additions	Checks and other deductions	Ending balance
15,159.79	.00	.00	15,159.79
		Average ledger balance	Average collected balance
		15,159.79	15,159.79

## Deposits and Other Additions

Description	Items	Amount
Total	0	.00

## Checks and Other Deductions

Description	Items	Amount
Total	0	.00

## Detail of Services Used During Current Period

Note: The total charge for the following services will be posted to your account on 06/03/2024 and will appear on your next statement as a single line item entitled Service Charge Period Ending 05/31/2024.

Description	Volume	Amount	
Account Maintenance Charge		.00	Requirements Met
Total For Services Used This Period		.00	
Total Service Charge		.00	

THE PENNSYLVANIA ACCOUNTANT  
PAC ACCOUNT  
MONEY MARKET-PNC

FOR THE PERIOD ENDING MAY 31, 2024

04/30/20	Balance		49,384.04
JAN 30,2023 TO MAY 31, 2023		2.43	49,386.47
JUNE01 2023 TO AUG. 31, 2023		1.24	49,387.71
SEPTEMBER 1, 2023 TO APRIL 30, 2024		3.29	49,391.00
MAY 31, 2024		.41	49,391.41

# Premium Business Money Market

PNC Bank



For the Period 05/01/2024 to 05/31/2024

Primary Account Number: 50-0581-9704

Page 1 of 1

Number of enclosures: 0

PENNSYLVANIA SOCIETY OF PUBLIC  
PAC  
236 S HANOVER ST  
CARLISLE PA 17013-3944

For 24-hour banking sign on to  
 PNC Bank Online Banking on pnc.com  
FREE Online Bill Pay

For customer service call 1-877-BUS-BNKG  
PNC accepts Telecommunications Relay Service (TRS)  
calls.  
Para servicio en español, 1-877-BUS-BNKG

**Moving?** Please contact your local branch

Write to: Customer Service  
PO Box 609  
Pittsburgh, PA 15230-9738  
 Visit us at PNC.com/smallbusiness

## Premium Business Money Market Summary

Pennsylvania Society Of Public  
PAC

Account number: 50-0581-9704

### Balance Summary

Beginning balance	Deposits and other additions	Checks and other deductions	Ending balance
49,391.00	.41	.00	49,391.41
		Average ledger balance	Average collected balance
		49,391.01	49,391.01

### Interest Summary

Annual Percentage Yield Earned (APYE)	Number of days in interest period	Average collected balance for APYE	Interest paid this period	Interest paid year-to-date
0.01	31	49,391.01	.41	2.07

### Deposits and Other Additions

Description	Items	Amount
Other Additions	1	.41
Total	1	.41

### Checks and Other Deductions

Description	Items	Amount
Total	0	.00

### Daily Balance

Date	Ledger balance	Date	Ledger balance
05/01	49,391.00	05/31	49,391.41

### Activity Detail

#### Deposits and Other Additions

#### Other Additions

Date posted	Amount	Transaction description	Reference number
05/31	.41	Interest Payment	I-GEN124053100003060

#### Detail of Services Used During Current Period

Note: The total charge for the following services will be posted to your account on 06/03/2024 and will appear on your next statement as a single line item entitled Service Charge Period Ending 05/31/2024.

Description	Volume	Amount	Requirements Met
Account Maintenance Charge		.00	
Total For Services Used This Period		.00	
Total Service Charge		.00	

## Central Chapter

Date: June 04, 2024

To: PSTAP Board of Directors

From: Randy L. Brandt, Central Chapter Treasurer

Members of the Board of Directors of the Pennsylvania Society of Tax and Accounting Professionals,

Since the Annual Meeting in June 2023, the Central Chapter has conducted the following:

July 27, 2023 - Meeting of the chapter board of directors held at Gibraltar Restaurant in Lancaster, PA.

September 21, 2023 – Chapter CPE meeting and annual member social held at the Eden Resort in Lancaster, PA. CPE covered the topic “Ethics – Tax Practice Standards” and was presented by PSTAP Past-President James Tice, EA. A member social with happy hour and a steak dinner followed.

October 25, 2023 – Chapter CPE meeting, “1099-R Box by Box Federal Taxation and Annuity Taxation for Preparers” presented by PSTAP Past-President Mary Lew Kehm, CPA.

November 14, 2023 – Chapter CPE meeting, “Form 1023 Application for 501(c)(3) Tax Exempt Status and Form 990 Not-For-Profit Return” presented by PSTAP Past-President James F. Tice, EA. A meeting of the chapter board of directors followed.

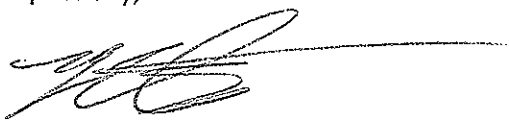
December 19, 2023 – Chapter CPE meeting, “A&A for Tax Practitioners” presented by James Newhard, CPA. The meeting was followed by a member holiday social.

January 16, 2024 - Chapter CPE meeting, “2023 Year End Tax Planning Update” presented by PSTAP Past-President Mary Lew Kehm, CPA

February 27, 2024 - Chapter CPE meeting, “Tax Season Roundtable” moderated by PSTAP Past-President H Richard Neidermyer, CPA and Rick Kauffman, EA.

May 21, 2024 - Chapter CPE meeting, “Social Security: Maximizing Benefits; Individual and Business Tax Credits” presented by PSTAP Past-President James F. Tice, EA. A meeting of the chapter board of directors followed.

Respectfully,



Randy L. Brandt, CPA  
Chapter Treasurer

**LEHIGH VALLEY CHAPTER**  
**PENNSYLVANIA SOCIETY OF**  
**TAX AND ACCOUNTING PROFESSIONALS**  
[www.pstaplv.org](http://www.pstaplv.org)

PRESIDENT'S REPORT  
STATE BOARD OF DIRECTORS ANNUAL MEETING  
JUNE 2024

TO: PSTAP Board of Directors  
FROM: Colleen S Krcelich, CPA, CFP®  
President, Lehigh Valley Chapter

On behalf of the Lehigh Valley Chapter, I am pleased to present the following activities for the period of July 1, 2023 through May 31, 2024.

Recent Events held by our chapter:

- June 20, 2023 Social Event – Wine and Spirit Tasting
- July 29, 2023 Social Event – Iron Pigs Game
- September 21, 2023 PA DOR Fall Tax Seminar
- October 17, 2023 Ethics & Estates
- November 8 & 9, 2023 1040 Update
- November 14, 2023 Local Tax Update
- December 5, 2023 Tax Season Update
- December 19, 2023 Holiday Party
- January 16, 2024 Medicare – Lets Keep it Simple
- February 27, 2024 Tax Roundtable I
- March 19, 2024 Tax Roundtable II
- April 16, 2024 Tax Season Debriefing
- May 21, 2024 Rental Real Estate

I also attended the following events:

- July 2023 – May 2024 PSTAP Line Officers (state) Meetings as scheduled
- July 2023 – May 2024 LV Chapter Board Meetings as scheduled

Future Events:

- August 20, 2024 Iron Pigs Baseball Game
- September 17, 2024 Breakfast meeting – topic to be determined – 3 hrs
- October 22, 2024 Ethics and ?? – 4 hours
- December 3, 2024 Mary Lew's Tax Season Update
- December 2024 Annual Holiday Party



Seminars:

- September 26, 2024 PA DOR
- November 12 & 13, 2024 1040 Update

The Lehigh Valley Chapter generally holds its Board of Directors meetings monthly at 4:00 PM and its membership meetings at 6:00 PM on the third Tuesday of each month. Meetings are held at various venues in the Lehigh Valley.

The following members serve on the Board of Directors:

Colleen Krcelich, CPA (President)  
Michelle Young, EA (Vice President)  
Judy Schultz, CPA (Treasurer)  
Susan Smith, EA (Recording Secretary)  
Judith A Stanz, PA (Corresponding Secretary)  
Mary Lew Kehm, CPA (Past-President)  
Barbara Ann Soltysiak, CPA  
David Markle, CPA

Please feel free to contact me with any questions or comments at [colleen@bizsupportllc.com](mailto:colleen@bizsupportllc.com) or 610.248.1744

Respectfully Submitted,

*Colleen*

Colleen S Krcelich, CPA  
President, Lehigh Valley Chapter

# **Pennsylvania Society of Tax and Accounting Professionals**

## **Northeast Chapter**

### **President's Report 77th Annual Meeting 6/9/2024**

The Northeast Chapter held three seminars in the fall of 2023: The first was led by Mary Lew Kehm and was on the subject of IRA's, 1099R's and Pennsylvania reporting. We then hosted Tax Speaker for the Business Tax Update and the two day 1040 course. The attendance at the first two was disappointing. The third was down from pre Covid levels but was up from the prior year. We have scheduled the Business Tax Update and the 2 day 1040 class again this year. There seems to a core group who are excited to return for the 1040 live event each year.

In other news we held a social event and chapter meeting May 22nd. We held elections of officers and since my term as president is over we elected Maryellen Shook as our new president and are excited for her leadership.

I cannot close without saying that we are proud to have our chapter member Jeanette Trama as the new State President.

**The taxpayer: Someone who works for the federal government  
but doesn't have to take a civil service examination.**

**...Ronald Reagan**



Philip Reid  
Chapter President



**PHILADELPHIA TRI-COUNTY CHAPTER  
ANNUAL REPORT  
July 2023 – June 2024**

On behalf of the Philadelphia Tri-County Chapter of the PSTAP, please accept this report of the following Chapter activities between July 1, 2023 & June 30, 2024:

<b>9/19/2023</b>	<b>Ethics, Divorce Taxation</b>
<b>9/28/2023</b>	<b>Jennings A&amp;A</b>
<b>10/27/2023</b>	<b>Jennings Business Entities</b>
<b>11/2/2023</b>	<b>Fall Tax Seminar</b>
<b>11/14/2023</b>	<b>Two Day 1040</b>
<b>12/12/2023</b>	<b>Year End Update</b>
<b>1/29/2024</b>	<b>PHL/Local Tax Update</b>
<b>6/4/2024</b>	<b>Ethics, Planning During Retirement</b>

We extend our heartfelt thanks and appreciation for the hard work put in by Tom Ostrowski and his Board this past year. Tom made a long journey to our joint CPE meeting last December and delivered a wonderful speech on PSTAP membership – on one foot! We are especially grateful to Andy Piernock and Linda Chicano, who served tirelessly on both the State & Chapter boards furthering the interests of the organization. Without the support of our State leadership, our excellent executive office, and members like Andy & Linda, we would be lost!

Respectfully submitted,

Amish Dhanak, EA  
President, Philadelphia Tri-County Chapter

**Amish Dhanak, EA**  
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## **SOUTH EAST CHAPTER State Board Meeting Report 7/1/23 to 6/9/24**

**We will be joining the Philadelphia Tri-County Chapter on September 18, 2023 at  
Springfield Country Club**

**Co-sponsor Jennings 1040 with Philadelphia November 14-15, 2024**

**Planning to return to Chapter meeting this summer**

**For further information or to be placed on our mailing list for meetings call our  
Chapter President**

**Richard Kelly at 610-388-9700**

**Check the PSPA Web Site at [www.pstap.org](http://www.pstap.org)**

Respectfully Submitted,

Richard B. Kelly, President Southeast Chapter PSTAP

PRESIDENT'S ANNUAL REPORT OF THE ACTIVITIES OF THE WESTERN CHAPTER  
OF THE PENNSYLVANIA SOCIETY OF PUBLIC ACCOUNTANTS [T/A  
PENNSYLVANIA SOCIETY OF TAX & ACCOUNTING PROFESSIONALS]

FOR THE FISCAL YEAR BEGINNING JULY 1, 2023

FOR THE 77<sup>TH</sup> ANNUAL MEETING, JUNE 9-12, 2024

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**CHAPTER CPE EVENTS:**

**July 19, 2023:** PA Tax Matters [4 CPE, non-Federal Tax], Wildwood Country Club, Allison Park, PA; Former Assistant to the Director of the PA Department of Revenue David Braden, CPA, joined the Chapter for a well-received program focusing on PA-specific tax credits.

**August 16, 2023:** Ethics [2 CPE] & Estate Planning & Elder Care [2 CPE, Other], Wildwood Country Club, Allison Park, PA; our sister member in the Western Chapter, Denise M. Hebb, CPA, CFE delivered her highly anticipated yearly update on professional ethics matters, and Colin B. May, Esq. of the Coulter Law Office's "Estate Planning Center" discussed the advantages – specifically the tax advantages – of timely estate planning.

**September 20, 2023:** Federal Tax Update [8 CPE, Federal Tax], Wildwood Country Club, Allison Park, PA; Mark L. Ribas, CPA, of the Pennsylvania Tax Institute, updated our members on Federal Tax matters in preparation for the upcoming tax season. The presentation focused on provisions of the Inflation Reduction and SECURE Acts, as well as energy tax credits.

A speaker from Berkheimer Tax Innovations was scheduled to speak to the Chapter on October 18 on Local Tax Matters; unfortunately, he was unable to appear at the last minute and a substitute speaker was scheduled for December 8. As it happens, *that* speaker also was forced to cancel.

**CHAPTER BOARD MEETINGS & OTHER EVENTS:**

**November 7, 2023:** PA Department of Revenue Fall Tax Seminar, Regional Learning Alliance, Cranberry, PA; I was not in attendance at this event.

**November 16, 2023:** Western Chapter Board of Directors Meeting, Wildwood Country Club, Allison Park, PA; I presented a report detailing matters discussed at the September 22 & 23, 2023 Executive Board meeting and Strategic Planning Session, including Legislative matters such as the organization's role in opposing the proposed Tele-File shutdown, the Governor's "work-from-home" policies as far as it concerns employees of the PA Department of Revenue, attempts to "work around" the \$10,000.00 cap on state and local taxes deducted on Schedule A and reform of the PA Inheritance Tax. The Directors also discussed then-current Chapter membership statistics and other Chapter-specific matters such as the CPE agenda for the year to come, nomination of persons to fill various positions on the Board and potential social events including, for the second year in a row, an "after-tax-season" party for the Chapter.

**April 27, 2024:** Western Chapter “After-Tax-Season” Gathering, Wildwood Country Club, Allison Park, PA; the aforementioned “after-tax season” party was held and, for a second year in a row, was very well received. Due to illness, I was not able to attend this event.

**June 9-12, 2024:** 77<sup>th</sup> Annual Meeting of the Pennsylvania Society of Public Accountants [T/A PSTAP], Grand Hotel, Cape May, NJ; I will not be in attendance at this event, though I am aware of at least two members of the Western Chapter Board of Directors who *will*.

**June 18, 2024:** Western Chapter Board of Directors Meeting, Wildwood Country Club, Allison Park, PA; the Board of Directors will meet to discuss matters of concern to our Chapter, our incoming slate of Officers and Board Members for the new fiscal year, review the Chapter’s Form 990 and accompanying Financial Statements and honor our departed friend and brother member Charles Willison, who passed from this life unexpectedly on May 28, 2024.

**EXECUTIVE BOARD & COMMITTEE MEETINGS:**

**September 22, 2023:** Strategic Planning Session, Best Western Premier Hotel, Harrisburg, PA; the Officers & Directors – with the assistance of an outside consultant – discussed matters of import to the organization.

**September 23, 2023:** Executive Board of Directors Meeting, Best Western Premier Hotel, Harrisburg, PA; the Officers & Directors gathered together to report on their recent activities as far as it concerns their Statewide Committees and individual Chapters.


**November 24, 2023:** Virtual Statewide Scholarship Committee Meeting; the members of the Committee met via Zoom to discuss the applications for the various PSTAP scholarships and select the candidates.

**December 2, 2023:** Virtual Executive Board of Directors Meeting; the Officers and Directors gathered via Zoom to report on recent Chapter activities as well as the activities of their statewide committees.

**May 3, 2024:** Strategic Planning Session, PSTAP Offices, Camp Hill, PA; I was unable to attend this event.

**May 4, 2024:** Executive Board of Directors Meeting, PSTAP Offices, Camp Hill PA; the Officers & Directors gathered together to report on their recent activities as far as it concerns their Statewide Committees and individual Chapters.

Submitted respectfully,

  
Aaron R. Perriello, President  
PSTAP Western Chapter