

## CENTRAL CHAPTER

PA: PX-000501L , NJ: 20CE00159200, NY: 002280, IRS: E3S5R

### The New Trump 530A Accounts and Alternatives— Tax and Financial Planning Considerations for Child Savings

Thursday, May 21, 2026

**Best Western Eden Resort**  
222 Eden Road  
Lancaster, PA 17601  
717-569-6444

**Registration & Breakfast: 7:00—8:00 AM**  
**CPE: 8:00 AM—12:00 PM**  
**Full, Hot Breakfast Buffet Included**  
**CPE: 4 Hours Federal Tax**

**SPEAKER: Mary Lew Kehm, CPA, PSTAP Past President**

**Registration Deadline: 5/16/26**

**ATTENTION!**  
PSTAP Members who attend at least 4 Central chapter meetings during the 2026 calendar year will receive a complimentary Deluxe Edition of THE TAXBOOK! Please note, books will be distributed at the January 2027 meeting. You must attend that meeting to get your book.

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**NAME:** \_\_\_\_\_ **PTIN #** \_\_\_\_\_

**Address:** \_\_\_\_\_ **City/State/Zip** \_\_\_\_\_

**Email Address:** \_\_\_\_\_ **Telephone:** ( ) \_\_\_\_\_ **Fax:** ( ) \_\_\_\_\_

**MEMBER (\$60)**     **STAFF (\$70)**     **NON MEMBER (\$85)**

Check made payable to: CENTRAL CHAPTER PSTAP/PSPA is enclosed.

Credit Card: \_\_\_MC \_\_\_ Visa/Amex/Disc Acct # \_\_\_\_\_ Exp: \_\_\_\_\_

Signature: \_\_\_\_\_ CVV#: \_\_\_\_\_

Register online at [www.pstapcpe.com](http://www.pstapcpe.com)

Amount Enclosed: \$ \_\_\_\_\_

**Attention! MAIL Form To PSTAP Executive Office**  
150 Corporate Center Dr., Ste. 205, Camp Hill, PA 17011  
Fax: 717-614-8663 Questions?: 1-800-270-3352

## **The New Trump 530A Accounts and Alternatives—Tax and Financial Planning Considerations for Child Savings Course Description:**

**Course Description:** IRS has released additional guidance on Trump Accounts under new Section 530A. Clients will be asking questions – make sure you have the answers, as well as pros and cons of various savings vehicles for minors.

This four-hour session will take a deep dive into various ways to save for minors, with a special emphasis on the new Trump/530A Accounts just starting up this year. Topics will include:

### **Trump/530A Accounts**

- Eligibility
- Setup
- Contribution rules
- Distribution rules
- Taxation before and after age 18
- Who is a good candidate for a Trump Account?
- Planning with Trump Accounts in addition/ in place of other accounts

### **Update on 529 Plans**

- Eligibility
- Setup
- Contribution Rules
- Distribution Rules
- Taxation
- Who is a good candidate for a 529 Account?
- Planning with 529 accounts
- ABLE (529A) accounts

### **Uniform Gift to Minors Act Account**

- Distribution rules
- Taxation
- Planning with UGMA accounts- pros/cons

### **Other options**

### **Key takeaways for you and your clients**

### **Speaker Bio: Mary Lew Kehm, CPA, PSTAP Past President**

Mary Lew is a Certified Public Accountant in solo private practice for more than 35 years, specializing in individual and small business taxes. Her office and home are in Whitehall Township, just north of Allentown, PA. She currently holds the PFS (Personal Financial Specialist) credential through AICPA.

Mary Lew has served as state President of the Pennsylvania Society of Tax and Accounting Professionals (Pennsylvania Society of Public Accountants), is a past president of the Lehigh Valley Chapter of the PSTAP/PSPA, and is the administrator of the PSTAP email discussion list, as well as an active member of the list. In addition to PSTAP, she is a member of AICPA, PICPA, and NATP. She has spoken on a wide range of tax topics geared to the small practitioner and is known for her in-depth research and practical take on complex issues.