

## LEHIGH VALLEY CHAPTER

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

# Ethics & Estates

**Tuesday, October 22, 2024**

**Hyatt Place, Aster Event Center**  
**621 Grange Road**  
**Allentown, PA 18106**  
**610-387-1000**

**Registration: 7:30 am**  
**Breakfast Buffet: 7:30—8:00 am**  
**CPE: 8 a.m.—12 p.m.**

**CPE Credit: 2 Hours Federal Ethics & 2 Hours Federal Tax**

**SPEAKERS: Helen P. O’Planick, EA, Heljan Associates**  
**and Eric R. Strauss, Esq., Worth, McGee and Fisher, PC**

**Registration Deadline: Monday, October 14, 2024**

Breakfast Buffet \_\_\_\_\_ No Meal: \_\_\_\_\_

**NAME:** \_\_\_\_\_ (See Mailing Label) PTIN # \_\_\_\_\_

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

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

**\*Registration confirmation will be sent to this address.**

**PRICING: (Check Applicable Boxes and Pay by Check or Credit Card):**

**Member** \$75.00    
  **Non-Member** \$95.00    
  **Employee Of Member\*\*** \$85.00

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

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

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

**Mail form with payment to: PSTAP Executive Office, Attn: Lehigh Valley Chapter**  
**150 Corporate Center Dr., Ste. 205, Camp Hill, PA 17011**  
**FAX: 717-614-8663 Questions? 1-800-270-3352**

\*\* An "employee" is a person who works under the control of a member-owner at an accounting firm or other business and receives a W-2. An "employee" cannot be an equity owner of the member's firm or have a firm of his/her own.

Business Casual Attire is Appropriate

## **Ethics and Estates Topics to be discussed:**

Ethics: Circular 230

Estates: Estate taxes, IRS form 706, Form 8971, and Form 709