

LEHIGH VALLEY CHAPTER

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

Ethics—Preparer Due Diligence and Preparer & Promoter Penalties Tuesday, October 20, 2026

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: 4 Hours Federal Ethics

SPEAKER: Jason H. Daughtry, EA

Registration Deadline (Mail/Fax): Friday, October 9, 2026
Registration Deadline (Online): Wednesday, October 14, 2026

Breakfast Buffet _____

No Meal: _____

NAME: _____ PTIN # _____

Address: _____ City/State/Zip _____

*Email Address: _____ Phone: (____) _____

*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

IRS: E3S5R-E- Oct 20 LV Ethics

Course Description:

Preparer Due Diligence: A comprehensive review of preparer due diligence requirements, documentation standards, common compliance issues, and penalty avoidance strategies.

Preparer and Promoter Penalties: Explore the various civil penalties that may be imposed on tax return preparers and promoters, IRS enforcement initiatives, and practical compliance safeguards.

Speaker Bio: Jason Daughtry, EA

Jason H Daughtry is an Enrolled Agent and co-owner of Affirmative Tax Relief in Mays Landing, NJ and The Income Tax Place in Galloway, NJ where he works side by side with his wife who is also an Enrolled Agent. Jason began his career in 1995 with H & R Block where he served as a tax specialist and later a tax course instructor. He has been specializing in IRS and state representation since 2012 and is also an NTPI Fellow.

Jason enjoys spending much of his time mentoring Enrolled Agents and other tax professionals in the ways of representation and being advocates for the taxpayer. He is a member of the National Association of Tax Professionals, the American Society of Tax Problem Solvers, and the American Bar Association. Jason is also an NTPI Fellow.