PENNSYLVANIA SOCIETY OF TAX & ACCOUNTING PROFESSIONALS
LEVERAGE THE POWER OF SMALLER PRACTICES℠

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Questions???
1-800-270-3352

PHILADELPHIA TRI-COUNTY CHAPTER

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

Elder Care and Taxes & Ethics—Circular 230 Considerations
Tuesday, June 24, 2025

Springfield Country Club
400 W. Sproul Road (RTE 320)
Springfield, PA 19064
610-690-7600

Registration	**12:30—1:15 PM**
CPE:	**1:15—5 PM**
Dinner:	**5 PM**

Dinner buffet will be served

CPE Credits - 2 Hours Federal Tax & 2 Hours Federal Ethics

Members only FREE shredding event will take place prior to this meeting from 10:30 a.m.—12:30 p.m. in the Springfield Country Club upper parking lot

SPEAKER: James F. Tice, EA

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Registration Deadline: June 19, 2025

Name:________________________________ **PTIN #**____________________

Street Address: ________________________________**City/State/Zip**____________________

Email Address:________________________________ **Phone**: (____)____________________

☐ **PSTAP Member Fee: $129** ☐ **Non-Member Fee: $169**

Will you be joining us for dinner? Yes ___ No ___

Amount Enclosed: ______________________________

□ Check made payable to: Philadelphia Tri-County Chapter is enclosed.**

□ Credit Card: MC/Visa/Amex/Disc Acct # ________________________________ Exp: ________
Signature: ________________________________CVV#: __________

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

No show are ineligible for refunds. For full cancellation policy please visit pstap.org/event-policy Topics are Subject to Change

Elder Care & Taxes and Ethics—Circular 230 Considerations Course Descriptions

Ethics - Circular 230 Considerations: This course equips you with crucial insights for handling:

- Conflicts of interest among spouses, business partners, and tax professionals.
- It covers power of attorney, IRS interactions, client privacy concerns, professional advertising standards, and the effects on security and disclosure requirements.
- We will explore Circular 230 to ensure your tax practice adheres to ethical standards.

Elder Care and Taxes: This course addresses the critical intersection of aging and tax considerations in the U.S. As the senior population grows, understanding these issues becomes increasingly important. The course offers a comprehensive overview:

- Elder care planning strategies, including options for long-term care payment, tax implications of various legal documents, and suitable trust types for nursing home care.
- It also delves into the tax benefits of qualified retirement plans, health savings accounts, and charitable distributions.
- This course will equip you with the knowledge to navigate the complex landscape of elder care and taxes effectively.

Speaker Bio: James F. Tice, EA is a distinguished leader in the firm's tax practice. He specializes in organizing, preparing, and supervising complex tax planning and compliance for various tax-exempt organizations and small businesses. Mr. Tice frequently lectures on a wide range of topics, including tax, business, and ethics. He has been actively involved with the Pennsylvania Society of Tax & Accounting Professionals since 2005 and has been enrolled to practice before the IRS since 2012.