

PHILADELPHIA TRI-COUNTY & SOUTHEAST CHAPTERS

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

Planning During Retirement & Ethics and Circular 230

Tuesday, June 4, 2024

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

Registration 12:30—1:00 PM
CPE: 1—5:30 PM
Dinner: 5:30 PM

Dinner buffet will be served

CPE Credits - 3 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

Important! If you register after May 29th, please call the Executive Office at 1-800-270-3352 or email cathy@pstap.org for instructions on how to obtain the course material. All attendees must be registered by May 29th or meal is not guaranteed.

Name: _____ ID # _____ PTIN # _____
(See Mailing Label)
 Street Address: _____ City/State/Zip _____
 Email Address: _____ Phone: () _____ Fax: () _____

PSTAP Member: \$99 **Non-Member: \$149**

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

Check made payable to: Philadelphia Tri-County Chapter is enclosed.**
 Credit Card: ___ MC/Visa/Amex 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

- ****EACH SEMINAR OR MEETING REGISTRATION REQUIRES A SEPARATE FORM AND CHECK**
- **IF CHECK IS NOT RECEIVED WITHIN 7 DAYS OF EVENT, A LATE FEE OF \$10.00 MAY BE REQUIRED**
- **NO SHOWS ARE INELIGIBLE FOR REFUNDS/ALL TOPICS ARE SUBJECT TO CHANGE**

Planning During Retirement & Ethics and Circular 230 Course Description:

Planning During Retirement—This course will cover:

- Essentials of employer retirement plans (401-Ks & 403-Bs)
- IRA distributions, conversions, and rollovers
- Interplay with Social Security benefits
- SECURE Act 2.0 changes to RMDs
- Inherited IRAs
- Special approaches - 72(t) & NUA (Net Unrealized Appreciation)

Ethics and Circular 230: There are a variety of rules that place ethical constraints on the advice given by tax practitioners to their clients. This course will cover statutory, regulatory, and ethical standards governing those who are tax practitioners, emphasizing current issues in the application of rules of professional conduct, Circular 230, and provisions of the Internal Revenue Code and the Treasury Regulations governing return preparers to ensure ethical compliance in your tax practice.