

SOUTH CENTRAL CHAPTER

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

Elder Care and Taxes & Ethics and Circular 230

Wednesday, October 16, 2024

Camp Hill Corporate Center
(Formerly Deloitte Building)
300 Corporate Center Dr.
Camp Hill, PA 17011
Questions: 1-800-270-3352

Registration & Breakfast: 7:30 AM
CPE: 8:00 AM—12:00 PM

Assorted breakfast foods will be served

Speaker: James F. Tice, EA

CPE: 2 hours Federal Tax & 2 hours Federal Ethics

Registration Deadline: 10/11/2024

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NAME: _____ ID # _____ PTIN # _____

Street Address: _____ City/State/Zip _____

Email Address: _____ Phone: () _____ Fax: () _____

MEMBER (\$55) **STAFF (\$60)** **NON MEMBER (\$65)** **STUDENT: Free**

Check made payable to: SOUTH CENTRAL CHAPTER PSTAP is enclosed.**

Credit Card: ___MC ___Visa/Amex Acct # _____ Exp: _____

Signature: _____ CVV#: _____

Register online with credit card at www.pstapcpe.com

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

**** Please make checks payable to: SOUTH CENTRAL CHAPTER PSTAP**
Separate check requested for each event. Please do not combine meeting and seminar fees.
No Shows are Ineligible for Refunds — All topics are Subject to Change.

OCT16 SOC Elder care/Ethics IRS E3S5R:

Elder Care and Taxes & Ethics and Circular 230 Course Description:

Elder Care & 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 of 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.

Ethics & 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.

Speaker Bio:

Mr. James Tice is a 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. He lectures on a wide range of tax, business, and ethic topics. He has been actively involved with the PA Society of Tax & Accounting Professionals since 2005, and has been enrolled to practice before the IRS since 2012.