

## **WEST CENTRAL CHAPTER**

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

### **Ethics and Estate Planning** **Wednesday, September 30, 2026**

**Blair County Convention Center**  
1 Convention Center Dr.  
Altoona, PA 16602  
814-943-5392

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

*Breakfast Buffet will be served*

**CPE Credits: 2 hours Federal Tax & 2 hours Federal Ethics**

**Registration Deadline: 9/29/26**

**SPEAKER: Robert J. Henkels, CPA**

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**NAME:** \_\_\_\_\_ **PTIN #** \_\_\_\_\_

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

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

☐ **PSTAP Member \$69**   ☐ **Non-Member \$99**

*Register online at [www.pstapcpe.com](http://www.pstapcpe.com)*

☐ **Check made payable to PSTAP is enclosed.**

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**Exp:** \_\_\_\_\_ **CVV#:** \_\_\_\_\_

**Signature:** \_\_\_\_\_

**Mail form to PSTAP Executive Office:**

150 Corporate Center Dr., Ste. 205, Camp Hill, PA 17011

FAX: 717-614-8663

Questions: 1-800-270-3352

**No Shows are Ineligible for Refunds. See full refund policy at [pstap.org/event-policy](http://pstap.org/event-policy) All topics subject to change.**  
**IRS: E3S5R WC Sept 30 Ethics/Estate Planning**

**Ethics - Circular 230:** This program will focus on the foundation of ethics and areas of concern to tax preparers in general ethical situations, as well as the regulations governing practice before the IRS, particularly for tax professionals like Enrolled Agents and CPAs. Appropriate sections of Circular 230 will be reviewed.

**Estate Planning:** This session will give tax professionals a practical overview of estate planning concepts that directly impact client tax strategies. Review of the PA Inheritance Tax and the impact it could have on clients. Participants will learn how to guide clients and navigate changing laws.

**Speaker Bio:** Robert J. Henkels, CPA, is the president of Professional Tax & Accounting Seminars, Inc. He is currently a Senior Tax Manager with Smith, Nale & Company, Inc. He has been a discussion leader for the past 28 years for various organizations. He has received high ratings during this time. Mr. Henkels has 34 years of practical public accounting experience with national, regional and local CPA firms.

Mr. Henkels currently serves as an adjunct professor at LaRoche College teaching individual taxes, business taxes and auditing. He has served as an adjunct professor at Wheeling Jesuit University in the M.B.A. program, Chatham University, Duquesne University, University of Maryland and Montgomery College, MD. He also served as an assistant professor at the Indiana University of Pennsylvania for three years. He has also authored various CPE courses and written numerous articles for newspapers and magazines.

Robert earned his Bachelor's Degree in Accountancy from the University of Maryland, Master's Degree in Educational Administration from Northern Illinois University and a Bachelor's Degree in Education with a math/psychology concentration from Northern Illinois University. He is an active member of the AICPA, the PICPA and the National Society of Public Accountants.

