

WEST CENTRAL CHAPTER

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

Federal Tax Update

Thursday, December 12, 2024

Blair County Convention Center
One Convention Center Dr.
Altoona, PA 16601
814-569-1223

Registration & Breakfast: 7—8 AM
CPE: 8 AM—4:30 PM

CPE Credits: 8 hours Federal Tax

Registration Deadline: 12/4/24

SPEAKER: Mary Lew Kehm, CPA

For complete course description and speaker bio see the back of this form!

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NAME: _____ PTIN # _____

Street Address: _____ See Mailing Label
City/State/Zip _____

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

PSTAP MEMBER (\$230) **NON-MEMBER (\$300)**

Registration fee includes breakfast, lunch & refreshment breaks.

Check made payable to PSTAP is enclosed.

Credit Card: ____MC/Visa/Amex/Disc

Acct # _____ Exp: _____

Signature: _____ CVV#: _____

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

Federal Tax Update Course Description:

This session will review tax and financial changes preparers need to be aware of for the 2024 tax season. The session will take a practical look at law changes, IRS announcements, form changes, and other items that will affect tax return preparation.

Tentative topics include Final and Proposed Regulations for Inherited Retirement Plans; SECURE 2.0 provisions; digital currency update; expiration of TCJA; 1099-K; small business issues; retirement plan updates; State law updates; and Corporate Transparency Act updates.

Speaker Bio:

Mary Lew Kehm is a Certified Public Accountant in solo private practice for more than 35 years, specializing in individual and small business taxes. Her office and home are in Whitehall Township, just north of Allentown, PA. She currently holds the PFS (Personal Financial Specialist) credential through AICPA.

Mary Lew has served as state President of the Pennsylvania Society of Tax and Accounting Professionals (Pennsylvania Society of Public Accountants), is a past president of the Lehigh Valley Chapter of the PSTAP/PSPA, and is the administrator of the PSTAP email discussion list, as well as an active member of the list. In addition to PSTAP, she is a member of AICPA, PICPA, and NATP. She has spoken on a wide range of tax topics geared to the small practitioner, and is known for her in-depth research and practical take on complex issues.

What You Need to Know About Registration Changes & Earning CPE Credits

Due to rising costs and hotel constraints/inflexibility as well as the lead time required for manual/material orders from our speakers, we will be instituting the following policies. Thank you for your understanding and cooperation.

In-Person Seminar Cancellation and Refund Policy

Cancellations received 10 or less days prior to an in-person seminar, are NOT eligible for a refund under any circumstance. Cancellations received between 11 and 14 days in advance of the seminar are subject to a cancellation fee of \$75 fee per day (\$150 for the 2-day 1040); the remainder of the registration fee will be refunded to the original form of payment. Cancellations received more than two weeks (14 days) prior to the seminar will be refunded in full to the original form of payment.

Transfer Policy

PLEASE READ: We have had an influx of last-minute transfers from one program to another which has forced the organization to incur unnecessary costs. Because we incur hotel costs (meals, refreshment breaks, and set up) once counts are given, requests to transfer from an in-person seminar to a webinar of the same program, or to a different location of the same program, or to a different course entirely, not received a minimum of **10 days** in advance of the seminar are subject to a transfer fee of \$75 per day (\$150 for the 2-day 1040). We thank you for understanding that no exceptions can be made to this policy.

No Shows

If you fail to show up to a course, you are not eligible for a refund OR a transfer to another course. We are paying for you whether you are in attendance or not. Please be advised that overnight voicemail messages and emails are considered no-shows and are ineligible for refunds.