

December 9, 2022



NMSEA HAPPENINGS

NEW MEXICO SOCIETY OF ENROLLED AGENTS, INC.
 P.O. BOX 30974
 ALBUQUERQUE, NM 87190-0974
 WEBSITE: NMSEA.NET
 E-MAIL: NMSEA2020@GMAIL.COM

President's Letter

Future NMSEA Monthly Meetings & Topics

Voting now open for the nominees for 2023-2024 NAEA Board of Directors. Voting ends Dec 15. (see page 2)

Overloaded with clients? NMSEA Members accepting referrals (see page 2)

ABQ Tax Preparer & Consumer Rights Ordinance History (Update: Revised ABQ Tax Preparer Ordinance approved unanimously by ABQ City Council at 8:32 PM in Dec 5 meeting.)

REMINDER: Renew you PTIN before December 31, 2022

REMINDER: EAs with SSN ending in 4,5, or 6, must renew by Jan 31, 2023.

December 2022 Update on President Biden's Student Loan Forgiveness plan. The administration has stopped accepting applications for Student Loan Forgiveness until the Supreme Court rules early next year on the legality of the program. However, 9 million student-loan borrowers received an email in late Nov with a subject line that their debt relief had been approved. It should have stated the applications had been received, not approved — an error made by an Education Department contractor

Educational Opportunities—NAEA & NMTRD

Attachment 1: November NMSEA Monthly Meeting minutes

Attachment 2: Pacific Northwest Action Wednesday (PNWAW) IMRS Call for Nov 16, 2022

Attachment 3: 2023 NMSEA Federal and NM Updates Registration Form (with additional information)

NMSEA Happenings on hiatus until May 2023

NMSEA Board: PRESIDENT: Peter Wanco, EA, NTPI Fellow, MBA VP: Sandra Weidner, EA, ABA, NTPI Fellow
 SECRETARY: Nancy Zmarzly, EA, NTPI Level 1 TREASURER: Keri Cardona, EA
 DIRECTORS-AT-LARGE: Carol Jane 'CJ' Davis, EA and Therese Francis, EA, PhD
 Past President: Shelley Barker, EA, NTPI Fellow

NMSEA dedicated phone number (505) 877-1598 & FAX (505) 298-2191

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It's a Great Day to be an EA

Good Golly, Miss Molly! Thanksgiving has come and gone! Christmas and Santa will soon be here. Followed by Tax Season 2023. ... all too soon? Maybe ... I hope you'll be ready ... Am I ready? I plan to be by attending the NMSEA Federal and New Mexico Tax Update next month.

For those of you who want to be ready for this upcoming Tax Season, registration is now open for NMSEA's Federal Tax Update, which will be held at the Courtyard by Marriot (5151 Journal Center Blvd NE) in Albuquerque, on Monday, January 9th and Tuesday, January 10th from 8 AM to 5 PM. The New Mexico Tax Update will be held Virtually from 9 AM to 1 PM on Wednesday, January 11th and will be presented by NMTRD.

In 2023, NMSEA will hold elections for all officer and director positions. As such, as President, I am looking for 3 NMSEA members to serve on the Nominating Committee. Please contact me at your earliest convenience.

Interested in advertising in our newsletter and on our website? Contact Richard Wright or myself with any questions.

Peter M. Wanco, EA, MBA, MS Taxation, NTPI Fellow, President NMSEA

Being an Enrolled Agent is not a job — It is a Profession!

**NMSEA Dec Meeting:
No December monthly
meeting.**



**Presentation: -
No presentation.**

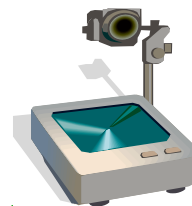
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 PAST PRESIDENT: Shelley Barker, EA, NTPI Fellow

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FROM THE EDUCATION COMMITTEE:

Co-Chairpersons: Lynne Shupp & Shelley Barker, Steven Stauss, Monica Hardeman, and Troy Scott

NMSEA Monthly Meetings will resume in May 2023



Voting now open for the nominees for 2023-2024 NAEA Board of Directors

Please take the time to [review the nominees' biographies, goals, and responses to the common question](#) before casting your ballot.

Learn more about the nominees by watching the [virtual candidate forum on our YouTube Channel](#).

Voting will close at 5:00 P.M. Pacific Standard Time (PST) on Thursday, **December 15, 2022**. Once you submit your candidate selections, you will not be able to revoke.

Nominee Information

Nominee information is available on the ballot page of the election website.

If You Need Help

For technical support (available Monday-Friday, 9:00 AM-5:00 PM Eastern Standard Time, USA, excluding holidays), please call (202) 822-6232 or email info@naea.org.

NOTE: Each members should have already received an NAEA email with their personalized link to cast their ballot. If you have not received a ballot, contact:

aarbitell@intelliscaninc.com

Are you overloaded with more clients than you can handle? NMSEA members accepting referrals/new clients

Bill Benton	(505) 296-1128	bill@bentonco.net	
Eloisa Rivera	(505) 984-0646	eloisa@taxsolutions-nm.com	Santa Fe
Carol Jane "CJ" Davis	(505) 296-0177	cjdavis@usa.net	
Steven Iversen	(505) 237-2360	sstogo@gmail.com	
Peter Wanco	(505) 471-6363	pwanco1@gmail.com	Santa Fe
Therese Francis	(505) 690-3923	taxprep@crossquarter.com	

Contact these members directly if you have questions. Is any other NMSEA member accepting referrals/new clients? If so, contact nmsea2020@gmail.com

Important Dates to Note on Your Calendar

Jan 9 - 10, 2023---[NMSEA Federal Update](#) (see Attachment 3)

Jan 11, 2023---[NMSEA New Mexico Update](#) (see Attachment 3)

Questions, suggestions, ideas wanted for NM Update (see Attachment 3)

NMSEA November 18 Monthly Meeting



Virtual Attendees (10)



In-Person Attendees (14)



President Wanco announced he was still waiting notification from the NM Tax Advisory Committee about the date of its first meeting.

Education Committee announced that the October Conference had a profit of \$3,100 with the raffle and auction generating over 50% of the profit. NMSEA presenters at the October Conference did not charge for their presentations resulting in a lower registration fee. The registration fee for the 2023 Federal Update will be higher since the primary presenter has a hourly fee of \$250 plus travel and hotel costs.

Winner of the 2022 NAEA Awards: The Founders Award, The Excellence in Education Award, The Excellence in Public Awareness Award, The EA Mentor of The Year Award, The Lee T. Byrd Outstanding Volunteer Award, The Outstanding Supporter of EAs Award. The Bill Payne Advocacy Award, and The Emerging Leader Award were announced at the Nov 18 NAEA BOD meeting.

The Revised ABQ Tax Preparers Ordinance (EAs were added to ABQ CPAs and ABQ Tax Attorneys and are now exempt from the additional requirements levied on all other types of tax preparers in ABQ) was approved by the FGOC in their Nov 14 meeting. The ordinance now goes to the ABQ City Council (meeting on Dec 5 and 19) for final approval.

The next NMSEA BOD election will be in June 2023. Elected BOD members will take over July 2023 for a two year term. If interested, contact the Nominating Committee.

Congratulations to Shelley Barker and Lynn Shupp for being invited to appear on "Issues and Answers with Diane Kinderwater" KCHF TV Ch 11 program on Tax Preparation Future and What is an Enrolled Agent? Part 1 was broadcast on Dec 7 and is available on YouTube at <https://www.youtube.com/watch?v=6sXZZepJ5h4>

Members have raised questions about the Employee Retention Credit (ERC) and Form 941-X. NMSEA will present a Zoom meeting on ERC after Thanksgiving.



Shelley Barker, EA, NMSEA gave an excellent and informative presentation on "Recent Tax Court Cases."

IRS reminds tax professionals that it's time to renew PTINs

Dear Tax Professional,

It is now Preparer Tax Identification Number (PTIN) renewal season for 2023.

All PTINs expire on Dec. 31 and must be renewed annually. You must have a valid PTIN if you plan to prepare any federal tax returns for compensation or you are an Enrolled Agent.

The renewal fee is \$30.75 and non-refundable. Get started at www.irs.gov/ptin

If you can't remember your User ID or password, use the "Forgot User ID" or "Forgot Password" links on the PTIN system login page. You will be asked to enter the email address associated with your account and the answer to your secret question.

To keep up with the latest info for return preparers, please subscribe to e-News for Tax Professionals.

- Visit www.irs.gov
- Select "News" then select "e-News Subscriptions"

Return Preparer Office, Internal Revenue Service



Enrolled Agent renewal season is underway

License renewal season began on Nov 1 for Enrolled Agents (EAs) with Social Security numbers ending in 4,5, or 6. EAs must renew by Jan. 31, 2023, to ensure you receive your new enrollment card before your current enrollment expires on March 31, 2023.

<https://www.irs.gov/tax-professionals/enrolled-agents/maintain-your-enrolled-agent-status>

Albuquerque Tax Preparer and Consumer Rights Ordinance History and Current Status

The ABQ Tax Preparer Ordinance currently excludes CPAs and Tax Attorneys but not EAs from the additional Ordinance requirements. NMSEA helped draft an amendment adding Enrolled Agents to the exclusion list.

The ABQ City Council in the Nov 15, 2021 meeting adopted a proposal by Don Harris (in a 5-3 vote with Sena, Gibson, and Borrego voting NO. Harris was not present for the vote) to Stay Enforcement of the Tax Preparer Ordinance until July 1, 2022.

The City Council met on June 22, 2022 and approved (9-0) a Pat Davis resolution to extend the stay of enforcement of the original Ordinance to Dec 31, 2022. A revised Ordinance has been drafted (including the NAEA/NMSEA amendment to exclude EAs from the additional tax preparer requirements).

Dec 5, 2022 Update: Finance & Govt Operations Committee (FGOC), in Nov 14 meeting, approved the revised Ordinance which now excludes CPAs, Tax Attorneys, **and EAs** from the additional Ordinance requirements. The revised Ordinance was unanimously approved by the ABQ City Council at 8:32 PM at their Dec 5 meeting.

Current City Council members are:

Louie Sanchez, District 1.

Klarissa J. Peña, District 3.

Dan Lewis, District 5, VP

Tammy Fiebelkorn, District 7.

Renée Grout, District 9

Isaac “Ike” Benton, District 2, President

Brook Bassan, District 4.

Pat Davis, District 6.

Trudy E. Jones, District 8.

Finance & Govt Operations Committee (FGOC)

Chairperson Patrick Davis, Brook Bassan, Isaac “Ike” Benton, Dan Lewis, and Klarissa J. Peña

NMSEA Board of Directors



NMSEA is collecting items for Albuquerque students under Title 1 through APS APS students need your support and help. Specific donation items requested: wide ruled and college ruled paper, wide ruled and college ruled spiral notebooks, 1 inch binders, #2 pencils, colored pencils, crayons, watercolors, compass, pencil sharpeners, protractors, notebook dividers, and locks as well as non-perishable food items that can be used for lunch and after-school snacks including granola bars and small canned food items w/easy-open lids---Cheese and peanut butter crackers, Ramen noodles, Single serving Chef-Boy-R-Dee items, Jerky (any kind), Applesauce/fruit cups, Tomato juice, Cereal bars, Granola bars, Power bars, microwaveable Spaghetti-o's, Spaghetti (pasta), Spaghetti sauce, Peanut butter, Variety packaged chips, Dried fruit, Canned food, packaged nuts, Fruit snacks, boxes of Mac and Cheese, popcorn, and canned soups. Alternate donation is cash/check.



Pacific Northwest Action Wednesday (PNWAW)
IMRS Call for Nov 16, 2022 (Attachment 2)

Ellen Briscoe, EA, ATA is our representative. The purpose of the Action Wednesday Call for Area 6 is for the practitioner community to bring issues related to IRS functions to the attention of the IRS. Specific taxpayer issues are not addressed. If you have a problem that may need to be corrected, please bring it to Ellen's attention at: ecbtaxpro@comcast.net Next meeting scheduled for January 18, 2023.

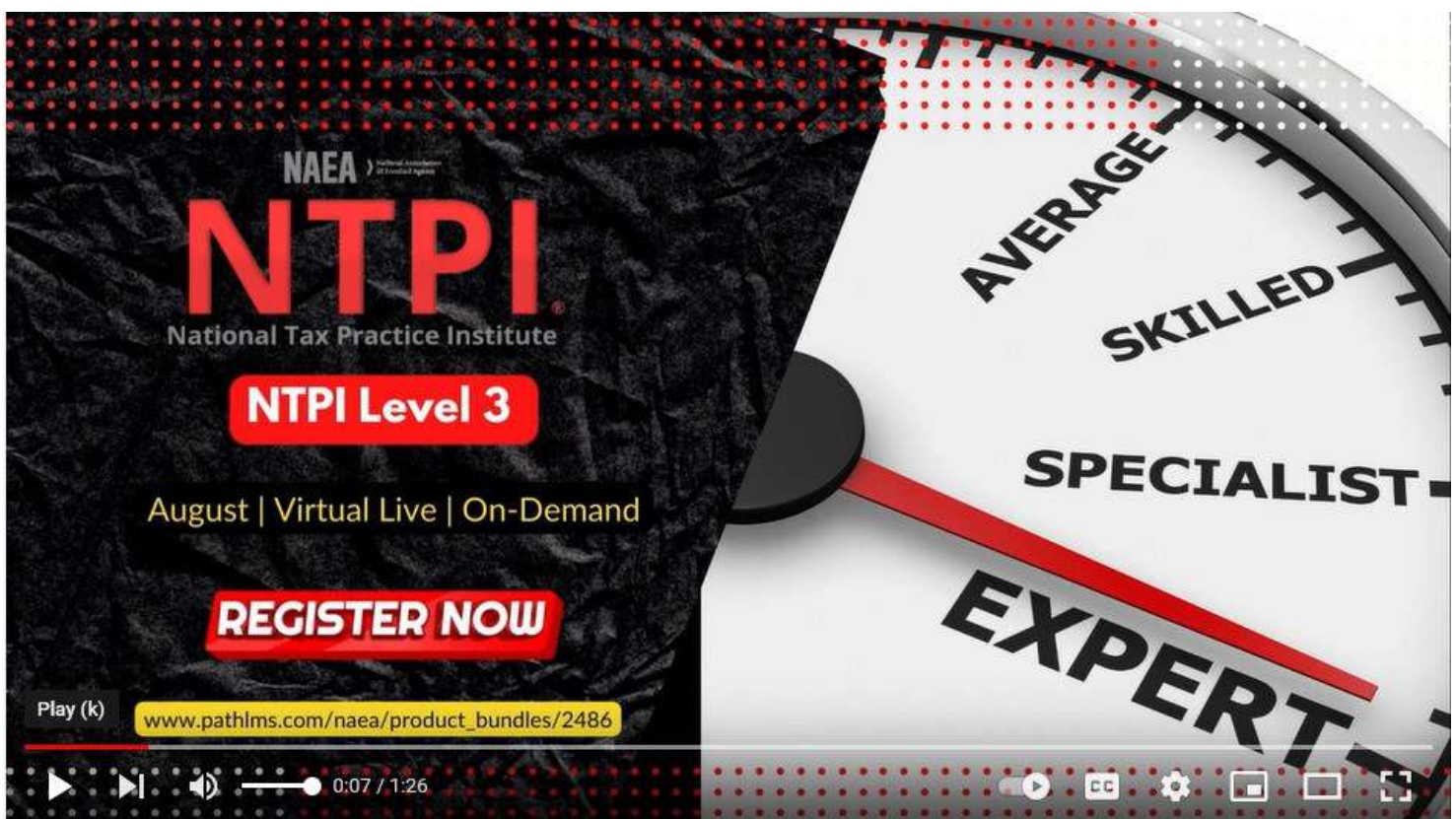
Stakeholder Liaison Area	Phone	Email
Area 2 (CT, DE, MA, MD, ME, NH, NJ, NY, PA, RI, VT)	412-404-9151	CL.SL.Area.2@irs.gov ✉
Area 3 (AL, DC, IA, IL, IN, KY, MI, NC, OH, TN, VA, WV)	405-982-6807	CL.SL.Area.3@irs.gov ✉
Area 4 (AR, FL, GA, LA, MS, PR, SC, TX, and U.S. VI)	216-415-3518	CL.SL.Area.4@irs.gov ✉
Area 5 (CA, HI, ID, MT, NV, WY)	203-492-8630	CL.SL.Area.5@irs.gov ✉
Area 6 (AK, AZ, CO, KS, MN, MO, ND, NE, NM, OK, OR, SD, UT, WA, WI)	206-946-3703	CL.SL.Area.6@irs.gov ✉

Educational Opportunities



Current Webinars and E-Learning

<https://www.naea.org/careers-learning/e-learning/?pathPage=%2Fnaea%2F>



NAEA 2022 Events Preview Video

NAEA introduces new way to learn about their upcoming educational webinars and seminars. Check out this YouTube video from NAEA:

<https://www.youtube.com/watch?v=2t73c6iu2mc>

Educational Opportunities



Workshops Schedule

The New Mexico Taxation and Revenue Department suspended its in-person workshops in March 2020 in response to the public health emergency. The Department resumed tax workshops for New Businesses and now New Employers in a virtual format using the Zoom online meeting platform. Participants will be able to direct their questions via New.Businesses@state.nm.us which will be posted during the presentation.

New Business Workshop

The New Business Workshop presented by NM Taxation & Revenue is a comprehensive look at the Business Tax Identification Number (BTIN) nee CRS— Gross Receipts, Withholding and Compensating Tax programs. It covers such topics as Non-Taxable Transaction Certificates, Estimated income tax payments for business owners, deductions and exemptions from Gross Receipts, special tax programs and audits. We also present e-file training.

<https://www.tax.newmexico.gov/news-alerts/workshop-schedule/>



2022 NMSEA pins and mousepads. Members get one free and only \$5 each for extras or for non-members! Sandy Weidner will be distributing them as she sees members or they can contact her if they want to buy one at: sweidner45@comcast.net



No trees were harmed in the creation of this newsletter. However, a lot of electrons were terribly inconvenienced.

To receive this newsletter, please send your e-mail address to the newsletter editor, Richard Wright, at rwright77@comcast.net (editor since July 2009)

The *NMSEA Happenings* is published by the New Mexico Society of Enrolled Agents, Inc, PO Box 30974, Albuquerque, NM 87190-0974 for the benefit of NMSEA members and affiliates. This publication is designed to provide accurate and authoritative information in regard to the subject matter covered. It is distributed with the understanding that neither the publisher nor author is engaged in rendering specific legal, tax or accounting advice or other professional services. If specific advice or other expert assistance is required, the services of a competent professional person should be sought.



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Contact Peter Wanco, NMSEA President at
pwanco1@gmail.com for approval of your ad.



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NEW MEXICO SOCIETY OF ENROLLED AGENTS
PO BOX 39074 ALBUQUERQUE, NM 87190-1974

IT'S A GREAT DAY TO BE AN EA

Minutes of the NMSEA Monthly Meeting, November 18, 2022 live and Zoom on-line.

MEMBERS PRESENT: Shelley Barker, Virginia Fell, Sue Pules, Kay O'Connor, Monica Hardeman, Mary Lois Hulsman, Peter Wanco, Sandy Weidner, Richard Wright, Nancy Zmarzly, Sandy Harstad, Diane Lynne Shupp, Jackie Claridge & Steve Iversen.

Virtual Attendees: Keri Cardona, Therese Francis, Pamela Ferguson, Carla Cross, Ben Montoya, Michelle Matteucci, Kathy Ayre, CJ Davis, Christine Sallee, Steve Stauss.

Peter Wanco, President called meeting to order 12:01 pm.

Secretary's Report: Nancy Zmarzly motion to pass September NMSEA minutes as reported by Shelley Barker, the substitute Secretary. Steve Iversen second the motion.

Treasurer's Report: Keri Cardona presented the current P&L and Budget. P&L includes the October Convention funds. Monica Hardeman motions to accept the Treasurer's Report and Lynne Shupp seconds.

President's Report: Peter Wanco has not yet been contacted to meet with NMTRD Tax Advisory Committee. There has not been an appointment for the NMTRD Deputy Secretary's position replacement.

Team Reports:

Education: Shelley Barker shared that more than half of the \$3100.00 profit from the October Conference was from the Auction/Raffle. The Education Committee is attempting to set a reasonable price to attend the January conference. Registration for the January Conference is now available in Eventbrite and paper form. The fee is set at \$350.00. AJ Reynolds, EA is presenting Federal Updates January 9th and 10th and NMTRD will present State Updates via Zoom on January 11th. A \$50.00 fee will be charged for Non-members to attended NM updates. No CE will be given for NM updates.

Membership: Sandy Weidner continues to send out NAEA bags to members currently registering. Sandy announced the NAEA member Awards were recently presented.

Unfinished Business: Albuquerque Proposed Ordinance 20 addressing Tax Preparers now shows EAs excluded from the City Ordinance Regulations. Shelley Barker is hopeful the proposal will be presented and voted on in December by the ABQ City Council.

New Business: Voting to elect a Nominee for Officer will take place during the June 2023 NMSEA Meeting. Lynne Shupp and Shelly Barker are invited to participate on the TV show "Issues and Answers with Diane Kinderwater". The show will be taped December 5th and air sometime in January on KCHF.

Monica Hardeman and several others are requesting more information on ERC or a possible presentation from AJ Reynolds to acquire a better knowledge reporting on Form 941-X's.

Education Presentation: "Recent Tax Court Cases" presented by Shelley Barker, EA.

Next monthly meeting will be Friday, May 19th 2023.

Kay O'Connor motions to adjourn and Steve Iversen second. Meeting adjourned at 1:45pm.

Respectfully Submitted,

Nancy Zmarzly.

Nancy Zmarzly, Secretary

November 16, 2022

Pacific Northwest Action Wednesday IMRS Call

Virtual Meeting via MS Teams

Time: 10:00 am –11:00 am (PDT)

Attendees:

Internal Revenue Service

- Cathye Mason, Stakeholder Liaison
- John Blakeman, Stakeholder Liaison
- Mercean Lam, Stakeholder Liaison
- Sarah DeBurle, Taxpayer Advocate Service, WA
- Kristen Hoiby, Stakeholder Liaison

Practitioner Representatives

- Laurie Brock, Oregon TAP
- Donna Patterson, Washington TAP
- Jeremy Saladino, WAATP
- Michael Davidson, ORSEA
- Barbara Haluschak, WSTC
- Lisa Rogers, AKSCPA
- Shawn Mattingly, WA
- Catherine Grubb, WSSEA
- Vera Likhonin, WA
- Barbara Culver, WSSEA
- Judy Hanson, WSTC
- Terry Bakker, OAIA
- Daniel Stearns, ORSEA
- Jim McClaflyn, WSSEA
- Edwin Del Carpio, WA
- Robin Smith, WSTC
- Doug Henne, OSCPA
- John Hawkins, OSCPA
- Elliott Gidan, CO
- Harriet Strothers, OSCPA
- Therese Sharp, AKSCPA
- Cynthia Polley, WA
- Colleen Barbee, OSTC
- Edwin del Carpio, WA
- Ellen Briscoe
- Dave Freeland
- Krish Perinkulam
- Larry Hess
- Olga Mironova
- Robin Harris

Meeting Summary

National Tax Security Awareness Week:

It happens every year at the end of November, so get ready for NTSAW! On the schedule for this year:

Monday-shopping tips for Cyber Monday

Tuesday-Giving Tuesday charity scams

Wednesday-Tax Pros and the WISP

Thursday-Get an IP PIN

Friday-Small Business special message

The webinar on your slide is happening Tuesday of NTSAW and we will put the link to register in the chat. For those of you who do not like to grab those during the meeting, it will also be in your minutes this month, as will all the links we post in chat today.

<https://www.webcaster4.com/Webcast/Page/1148/47098>

IP PIN Application news:

The Get an IP PIN application is tentatively scheduled to be taken offline beginning Saturday, November 19, 2022 thru Sunday, January 8, 2023 for annual maintenance and in preparation of issuing new IP PINs for FS 2023. The application is tentatively scheduled to come back online on Monday, January 9, 2023. This information has not been formally announced but came from our Data Breach cadre member for Area 6.

Recent Updates and news from the Mission Critical page on IRS.gov:

As of November 10—"If you are due a refund, filed on paper **more than six months ago**, and Where's My Refund? does not indicate we received your return, you should resubmit your tax return, electronically if possible." This pertains to Form 1040, NOT 1040X. Please keep an eye on this page as important updates like this one can appear as often as every week! <https://www.irs.gov/newsroom/irs-operations-during-covid-19-mission-critical-functions-continue>

Publication 3112, "IRS e-file Application and Participation", is now available on IRS.gov.

This revision replaces the previous edition revised November 2021. *Stay Informed* and *What You Need to Know* are new sections which includes the following updates:

- New electronic fingerprinting process for e-file applicants
- New option to digitally upload support documentation
- Updated IRS e-file information for participants

This publication is a great way applicants and participants can stay up to date on the latest IRS e-file requirements.

Filing Season Start Dates:

Business tax returns: January 7, 2022

Individual tax returns: January 24, 2022

Keep up to date by checking in here: <https://www.irs.gov/e-file-providers/modernized-e-file-mef-status>

<https://www.irs.gov/pub/irs-pdf/p3112.pdf>

It's EA renewal time:

For enrolled agents (EAs) with Social Security numbers ending in 4, 5 or 6, renewal season began on Nov. 1, and you must renew by **Jan. 31, 2023**, to ensure you receive your new enrollment cards before current enrollments expire on March 31, 2023. EAs need to renew their credential every three years. EAs can submit their renewal application and payment online through Pay.gov.

<https://www.pay.gov/public/form/start/19304437>

Hot off the press this morning! The 2022 IRSAC Report to Congress is available at:

<https://www.irs.gov/pub/irs-pdf/p5316.pdf>

The IRS is hiring people!!!!!!

In addition to the more than 4,000 people recently hired to fill critical customer service representative positions, the IRS is now seeking more than 700 new employees to help taxpayers at taxpayer assistance centers (TACs) across the country. This increase in staffing is part of much wider IRS improvements enabled by the Inflation Reduction Act funding approved in August 2022.

For these 700 openings, the technical positions needed are Individual Taxpayer Advisory Specialists who provide face-to-face assistance in IRS TAC offices and the Initial Assistance Representatives, responsible for greeting and determining the needs of taxpayers visiting TAC offices.

In addition to the face-to-face representatives and phone assistors, the IRS is also working to hire additional people throughout the agency, not just in taxpayer service areas but in Information Technology and compliance positions – all with a goal of improving the work the IRS does.

All employees must be U.S. citizens and pass an FBI fingerprint check and tax compliance verification. Federal experience is not required. The applicant may have gained experience in the public sector, private sector or volunteer service. To learn more about these positions, visit: <https://www.usajobs.gov/>

Questions and Answers:

Q: I finally got the ID.me credential all figured out, but when I went into my online account I could not find where to get the IP PIN.

A: That is an excellent observation. The IP PIN is available through the Get an IPPIN tool on IRS.gov. So that's how you get the IPPIN...through the app, rather than the online account. We have elevated your feedback to ask Online Services to add a link to the Get an IP PIN tool within the Online Account interface. Seems logical to us!

Q: Just an observation that uploading documents from WA [for example, a picture of the drivers license] does not go so well... the drivers license is something of a holographic affair, and does not photograph well.

A: Yes, and there's a lot of folks in Oregon with the same type of license [yours truly, ahem]... with holographic elements...which is a security feature of its own, but doesn't have much to do with the ID.me. We are elevating your request to see if a TAC option to verify is feasible.

Q: So, for the tip mentioned earlier, about resubmitting a 1040 if the criteria above are met, does that mean ALL 1040s or does this just pertain to say 2021 returns?

A: The Mission Critical page does not specify so we will take it at face value and say ANY return that meets the criteria above.

Q: Is there a release date yet on the domestic filing exception for S-corps?

A: Information on that should be coming out soon. Final versions are published and are available on the page that contains the newest forms and publications as they are released. If you have been waiting for a final version, this is the page for you to keep an eye on: <https://www.irs.gov/downloadforms>

Q: We are trying to find a fax number to send in F9465 and other material, because we really don't want to mail anything right now...is there a fax number to send these documents in?

A: We've really scoured around on this one, and there doesn't seem to be any kind of number like that. However, we do feel that this is something that could be addressed and we will raise the issue as feedback.

Q: We are seeing issues with refunds not being sent out. We currently have one client with a 2019 return with a \$9500 refund that is showing on the transcript, but where is it?

A: Of course the first thing to do is check "Where's My Refund" on IRS.gov and you might also want to call 800-829-1040 and check...but assuming you've done that,

and assuming it's been more than a few months since the refund has been showing, it might be time to ask Taxpayer Advocate Service if they can help.

Q: Not to complain, but we sent in a FOIA request for some data and we received the data on CDROM, which is not really a widely used data storage method any more. In fact, it was something of a small issue finding a machine that would read it. Is this what we can expect from PGLD? And that's ok, but it would be nice to know so we can invest in an external disc reader.

A: Thank you for that observation. Yes, we have asked the FOIA folks at PGLD and it seems that they have a supply of CDs that they need to get through before going to the thumb drive method. However, if the requestor needs the information on a thumb drive they can request that it be re-sent on a thumb drive. For reference, you can specify in your initial request that you would like this delivery option as well.

UPDATE: We have heard back on our request for a percentage method of withholding to be added to the W-4 and once again it has been declined. The Analysts who responded to our request cite language in the Internal Revenue Code as the reason. Sorry to put a damper on your holiday cheer...we are sad as well.

For our new attendees – if you would like us to add your credential or the name of an organization you represent in future minutes, please let us know.

Cathye.S.Mason@irs.gov will work for this!

HAPPY HOLIDAYS EVERYONE!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!

Next Scheduled Meeting, January 18, 2023



NMSEA's 2023

Federal Tax Update

Presented by A.J. Reynolds, EA

Monday 1/9/2023 and Tuesday 1/10/2023

8 AM – 5 PM

8 AM – 5 PM

	Early Bird (Before 12/31/2022)	Late Bird (After 1/1/2023)	
NMSEA Member	\$350	\$375	
Non-Member	\$375	\$400	circle choice
Printed Course Materials	\$70	\$70	

A.J. will present in-person at the Courtyard by Marriott, 5151 Journal Center Blvd NE, Alb.

Attendees can attend either in-person or virtually and earn 16 CE credits

New Mexico Update

Presented by various speakers from NMTRD

Wednesday 1/11/2023

9AM – 1 PM

This is a totally Zoom Virtual Event (enjoy from the comfort of your home)

NMSEA Member – No Charge (registration is still requested) Registering? Yes No

Non-Member \$50

To Register for the events either:

1. Go to <https://www.eventbrite.com/e/2023-federal-new-mexico-tax-updates-tickets-469411591707> and register on-line (Eventbrite fees will apply)
2. Complete this registration form and submit
Mail to NMSEA, PO Box 30974, Alb. NM 87190-0974 or Fax 505-298-2191

Name _____ PTIN _____

Member of NMSEA? Yes No Planning on attending the Fed update In-person? Yes No

I prefer to pay by credit card. Please charge my Visa _____ MC _____ Amer Ex _____

Card# _____

Expiration date _____ Security Code _____ Zip Code _____

Email _____ Phone # _____

Signature _____ Total Charged _____

Federal Update - More info:

- A.J. is an Enrolled Agent with over thirty years of experience encompassing various areas of taxation. His firm, ABC Bookkeeping & Tax Service, is based in Sioux City, Iowa. A.J. always brings his everyday “in the trenches” experience to seminars nationally. His style of teaching is very informative, very interesting and very, very entertaining.
- A.J. will be covering the following topics:
 - Individual and Business Updates
 - K2 and K3 update
 - Rental Properties, including Short Term Rentals
 - 199A – Is Rental Property a Trade or Business?
 - Representation including IRS Penalty Abatement
 - Tax Planning Strategies for Moderate Income Client

There is a discount available for employers who register themselves as well as some of their staff. For more information contact nmsea2020@gmail.com .

New Mexico Update – More info:

NMSEA has asked NMTRD for the following presentations;

- A “State of the Union” update from the Cabinet Secretary Stephanie Schardin Clarke,
- Information about the various credits that our state offers,
- An example of how to carry-forward NOLs from previous years on the state tax return
- A guided tour of the TAP website (with all of the improvements that have been added)

If you have any questions or suggestions, please share them with NMSEA. We will give them to the NM presenters and make sure that they are answered.

Question? You can contact Lynne Shupp at 505-237-8350, Shelley Barker at 505-298-1744 or email nmsea2020@gmail.com