

June 9, 2023



NMSEA HAPPENINGS

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

President's Letter

Future NMSEA Monthly Meetings & Topics

NMSEA BOD Elections June monthly meeting. Floor nominations will be accepted at the June monthly meeting. Nominee needed for Secretary position.

Educational Opportunities—NAEA & NMTRD

Very Important NAEA Town Hall Meeting!!! June 14 (see pg 6)

Attachment 1: NEW NM Tax Information Authorization (TIA) Tax Disclosure form revised 3-27-23

Attachment 2: Official Minutes of the NMSEA May 2023 Monthly Meeting

Attachment 3: 2023 NMSEA Pat Jenkins Memorial Shred Fest flyer

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

The month of May has come and gone. We're now in June and summer will be upon us real soon. Remember, during this month, is the all-important voting for our next NMSEA President, Vice President, Treasurer, Secretary, and Director-at-Large positions. Remember - Please Vote. The future of your NMSEA depends on it.

For those of you thinking about getting an early start on Continuing Education this year, the CA Super Seminar starts June 19th to June 22nd, in Reno, NV, the Arizona EAs are holding their AZ SouthWest in Chandler, AZ from June 21st to June 23rd, the IRS Tax Forums are 'Live' this year starting July 11th in New Orleans, LA, along with other venues, and NAEA's Tax Summit in Scottsdale, AZ runs from July 29th to August 1st, just to point out a few events and places to consider.

As part of our education segment at the June meeting, Sandy Weidner and Shelley Barker will provide a run down of their most recent trip to Washington DC, along with what they learned from meeting with our elected representatives and their staffers.

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

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

NMSEA June Meeting:
June 16, 2023 at Noon (but you can join earlier) as a Zoom meeting (see pg 7) or attend in-person at Golden Corral, 5207 San Mateo Blvd, ABQ. \$15 fee.



Presentation: -
Shelley Barker, EA and Sandra Weidner, EA present "What is the IRS's Strategic plan?"

NMSEA Board: PRESIDENT: Peter Wanco, EA, NTPI Fellow, MBA VP: Sandra Weidner, EA, ABA, NTPI Fellow
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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

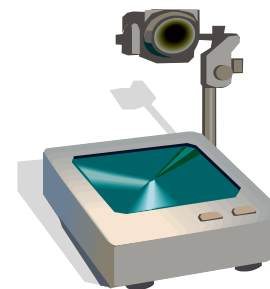
July 21, 2023---Remembering the correct treatment for business automobiles on the tax return - Sandy Weidner, EA. [Annual Membership Meeting with no \\$15 fee for attendees.](#)

Aug 18, 2023--Security Plans in your tax office - Lynne Shupp, EA

Sept 22, 2023--Family Caregiver Income - Taxable or Not Taxable? -- Monica Hardeman, EA, NTPI Fellow

Oct 20, 2023--No meeting due to NMSEA October Conference

Nov 17, 2023 --Recent Court Cases - Shelley Barker, EA



Important Dates to Note on Your Calendar

Tax pros: This summer the 2023 IRS Nationwide Tax Forum in-person format is once again coming to a city near you. General registration is set to open in March, but attendees can reserve their hotel accommodations now.

The Tax Forum locations and dates are:

New Orleans - July 11-23

Atlanta - July 25-27

Washington, D.C. area - Aug. 8-10

San Diego - Aug. 22-24

Orlando - Aug. 29-31

Take advantage of the Early Bird rate (available until June 15), and earn up to 18 CE credits for only \$245/person!

For more information and to reserve your accommodations, visit the IRS Nationwide Tax Forum website at:

[IRS Nationwide Tax Forum: Welcome \(irstaxforum.com\)](https://irstaxforum.com)

October NMSEA Conference planned for Oct 18 -19, 2023 but dates may change depending on availability of presenters.

Topics will include:

Ethics

Farms & Ranches

Foreign Source Income

Pass-through Entities

Corporate Transparency Act

(Passive Activity Loss) PAL and At-Risk rules

IRS Updates

Location: Courtyard by Marriott, 5151 Journal Center Blvd, Albuquerque -- where we had it last year. Social event planned for 6 PM, Oct 17 at nearby Restoration Pizza (which is right behind the hotel) at 5161 Lang Ave NE, Alb.

Important Dates to Note on Your Calendar (continued)

Arizona Society of Enrolled Agents:

Southwest Fest 2023, June 21-23, Chandler, AZ

<https://aztaxpros.org/SWF> NAEA member \$425 Nonmember \$575

You are invited to join us for quality continuing education presented by Fred Stein, CPA, Jason Daughtry, EA, and Aaron Blau, EA, CPA! This year's Southwest Fest will be held in the middle of Downtown Chandler at the historic Crowne Plaza San Marcos Hotel! Enjoy a beautiful staycation with summer rates at only \$109 a night! Wednesday night we will have a welcome reception with cash bar, and a special speaker discussing the future of the accounting industry.

Thursday and Friday, enjoy topics which will include a special session on Tax Preparer Due Diligence (Daughtry), Interplay between California and Arizona Taxes, Remote Workers and State Residency, Weird Dependency Situations, and Building a Tax Business for Remote and In Person Environments. More topics are possible as well!

California Society of Enrolled Agents:

Super Seminar in Reno, NV June 20 - 22, 2023

<https://superseminar.org/> In-Person and Online

Whether you're joining us in-person at the Peppermill in Reno or online, Super Seminar brings the tax preparer community together for unparalleled continuing education, best-in-class programming and more! All attendees will have access to:

- Unique education sessions across new and timely topic areas, covering cutting-edge strategies and shining case studies

- Inspirational speakers specializing in all things taxes

- Continuing education credits (CE)

- Countless networking opportunities

August 26, 2023--NMSEA Pat Jenkins Memorial Shred Fest will be held 10 am to Noon at the Faith Lutheran Church, 10000 Spain Rd, NE (same location as last year). Flyer at attachment 3.

NMSEA 2024 Federal Update is scheduled for Monday 1/8/24 and Tuesday 1/9/24 at the Courtyard by Marriott, 5151 Journal Center Blvd. Our presenter will, once again, be A.J. Reynolds. The **NMSEA 2024 NM Update** will be presented by Zoom from 9 am to Noon on Friday 1/12/24 with various NMTRD presenters.



NMSEA needs you to get out in front and become part of the Leadership

The Society is voting for President, Vice President, Secretary, Treasurer and two Directors-at-Large positions in June 2023. BOD installation will be at the July meeting. Please consider stepping forward and volunteering to run for one of the positions. **Secretary position needs a nominee**. Contact any member of the NMSEA Nominating Committee below for further information:

Barbara Padilla bbookeepin@msn.com 505-249-4067

Cathy Potts ctpotts50@gmail.com 505-250-5915

Virginia Fell r_fell@msn.com 505-681-1497

2023-24 NMSEA BOD Election Nominees

President: Sandra Weidner, EA, ABA, NTPI Fellow

VP: Lynne Shupp, EA

Secretary:

Treasurer: Therese Francis, EA, PhD

2 Directors-at-Large: John Niemi, EA, MACCT; Keri Cardona, EA;
Andy Rogers, EA

A ballot, distributed by ElectionBuddy.com, will be sent out June 21 and the election will end July 5. New BOD installed at Annual Membership Monthly Meeting (July 21) with no \$15 fee for attendees.

Reminder: NMSEA Associate members cannot run for office or vote.



Welcome aboard to: Felicia Dominguez, EA, Associate Member, Santa Fe; Jakie Claridge, EA, Albuquerque.

NMSEA Monthly Meeting May 19, 2023



5 Virtual Attendees



20 In-Person Attendees



President' comments: Major issue during this filing season were many NMTRD letters to tax preparers requesting TP ID documents such as pictures of driver's licenses, cancelled checks, etc for electronically filed state returns. Inquiries to NMTRD as to why produced vague (maybe computer glitches) or unsatisfactory responses.

Education committee: New members include Virginia Fell and Earl Collison. October conference shifted from Oct 19-20 to Oct 18-19 because Courtyard by Marriott not available on Oct 20. Monthly NMSEA meeting in September shifted from September 15 to September 22 due to conflict with the Sept 15 Business Tax Return deadline. Next year, the twice a month, NMSEA Roundtable Discussions will expand to Aug 2023 to May 2024.

A question was raised during a group discussion about Military Retirement Pay being partially exempt from New Mexico income tax versus New Mexico's status as a Community Property state. It was resolved that Military Retirement Pay was not considered Community Property.

Membership committee: There have been 9 membership renewals this year. Tote bags have been sent to those members if they had not received one in a previous year.

The upcoming NMSEA BOD election was discussed.. A ballot, distributed by ElectionBuddy.com will be sent out June 21 and the election will end July 5. Current nominees are President--Sandra Weidner; VP--Lynne Shupp; Secretary--none; Treasurer--Therese Francis; Director-at- Large (2 positions)--John Niemi, Keri Cardona, Andrew Rogers.

The NMSEA Pat Jenkins Memorial Shred Fest will be held in August at the Faith Lutheran Church, 10000 Spain Rd, NE (same location as last year).



Lelah Martinez, IRS Senior Stakeholder Liaison made an excellent presentation on a variety of topics including Form 1099-K, new Clean Vehicle regulations, IRS Dirty Dozen, ID.me information, E-signatures for certain forms, Cyber Security requirements, and sharing IRS information on Social Media. A lively question and answer session ensued. For ID.me--driver's licenses can be scanned and sent in as PDFs or JPGs. Irs.gov has a link to a list of forms that you can use e-signatures. New Cyber Security requirements are effective June 9, 2023 including having a written Risk Assessment document, all sensitive data must be encrypted, and every office must have an Incident Plan.



› National Association
of Enrolled Agents

Important NAEA Town Hall Meeting

Date & Time: June 14, 2023 02:00 PM Mountain Time
(US and Canada)

Description:

At their May 19 meeting, the NAEA Board of Directors voted to put forth bylaws amendments that will remove NAEA's dual membership with state affiliates and create a state chapter model. In addition, the board also approved the removal of the 30 hours CE requirement for all NAEA members and associates. These bylaws amendments will go to the membership for a vote in the fall. Attend the town hall to learn more about why these changes are being recommended and how this will impact your membership.

Registration link:

https://us02web.zoom.us/webinar/register/WN_RgoGi4EOSZOTQgt1yD9Opg#/registration

Your Zoom Meeting Invitation

NMSEA is inviting you to a scheduled Zoom meeting.

Topic: NMSEA Monthly Meeting

Time: June 16, 2023 Noon (MST) but you can join earlier if you want.

To Join Zoom Meeting either click on this link:

<https://us02web.zoom.us/j/88242009228>

or go to Zoom.us and click on the tab “Join a Meeting”

Meeting ID: **882 4200 9228**

Host will admit you.

One tap mobile

+13462487799,,88242009228# US (Houston)

+16694449171,,88242009228# US

NOTE: There is a new, unique link with Meeting ID for each monthly meeting.

This will be a **hybrid meeting** for ZOOM attendees and in-person attendees at The Golden Corral, 5207 San Mateo Blvd, ABQ.



Pacific Northwest Action Wednesday (PNWAW)
IMRS Call minutes for May 17, 2023 **(distributed by Constant Contact on May 23.**

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 June 23, 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



NAEA Continuing Education Portal

<https://www.pathlms.com/naea#>

NAEA

NAEA 2023 Tax Summit in Scottsdale, AZ July 29 - Aug 1, 2023

<https://www.naea.org/2023-tax-summit/>

Join NAEA from July 29 - August 1, 2023, for the 2023 Tax Summit with networking opportunities at The Westin Kierland Resort and Spa in beautiful Scottsdale, Arizona! This four-day in-person Tax Summit focuses on representation, tax preparation, and practice management. Network with some of the best and brightest tax professionals and suppliers at this one-of-a-kind event.

Other education opportunities:

Various certificate programs: Crypto, Investments, C-Corps, etc listed on the Continuing Education Panel webpage.

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/>



2023 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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pwanco1@gmail.com for approval of your ad.

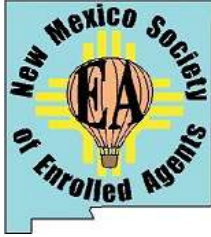


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https://www.360coveragepros.com/professional-liability-insurance/tax-preparers?utm_source=website&utm_medium=cpay&utm_campaign=360-nmsea-tax-preparer-banner-ad-2023



May 23, 2023

NEW New Mexico Tax Information Authorization (TIA) Form

There's a new state TIA form(attached) - significantly different than the prior one. The form says it came out 3/27/2023 but today was the first day my software provided the new form. The new form has a three-year life, which I think is the same as before.

--

Therese Francis, enrolled agent
Rainbow Bridge Services LLC
providing tax preparation, representation before the IRS, tax optimization, & more
PO Box 23749
Santa Fe, NM 87505
505-690-3923
214-975-9715 fax

New Mexico Taxation and Revenue Department

Tax Information Authorization

Tax Disclosure

PLEASE TYPE OR PRINT IN BLACK INK

This form will expire three years from the date that this *Tax Information Authorization Tax Disclosure* form has been signed by the authorizing individual listed below. If your authorized representative changes, submit a new form to notify the Department.

Check one (Required): <input type="checkbox"/> New <input type="checkbox"/> Update <input type="checkbox"/> Revoke <input type="checkbox"/> Revoke <u>All</u>					
Section I: Taxpayer Information					
*Required Fields (If the required fields are not complete, this form is <u>VOID</u> and the taxpayer's information will not be shared.)					
Name(s)*		A. Tax Identification Number(s)* SSN: ____ - ____ - ____		B. Reporting Period(s)* <input type="checkbox"/> All tax periods, or Specify: Tax Year(s): _____ Starting Period: _____ Ending Period: _____	
DBA Name(s) (If applicable)		Spouse SSN: ____ - ____ - ____			
Mailing Address* (If the address is new or changed, mark this box <input type="checkbox"/>)		FEIN: ____ - ____ - ____			
		NMBTIN: ____ - ____ - ____			
City*	State*	Zip Code*	C. Tax Program(s)* <input type="checkbox"/> All State Taxes		<input type="checkbox"/> Governmental Gross Receipts Tax
Telephone Number ()			<input type="checkbox"/> Personal Income Tax		<input type="checkbox"/> Interstate Telecommunications Gross Receipts Tax
			<input type="checkbox"/> Gross Receipts Tax		<input type="checkbox"/> Leased Vehicle Gross Receipts Tax and Surcharge
			<input type="checkbox"/> Wage Withholding Tax		<input type="checkbox"/> Non-wage Withholding Tax
			<input type="checkbox"/> Cannabis Excise Tax		<input type="checkbox"/> Oil and Gas Tax
			<input type="checkbox"/> Compensating Tax		<input type="checkbox"/> Other: _____
E-mail Address			<input type="checkbox"/> Corporate Income Tax		
Fax Number ()			<input type="checkbox"/> Fiduciary Income Tax		
Section II: Authorized Representative Information					
Individual Representative's Name*			TAP Logon (If applicable)		
Mailing Address*			Telephone Number* ()	Fax Number ()	
City*	State*	Zip Code*	E-Mail Address*		
Section III: Information Authorization					
Check all that apply					
<input type="checkbox"/> A. Authorization to disclose tax information. The Department is authorized to disclose confidential tax information on file to the above-designated individual or firm.					
<input type="checkbox"/> B. Authorization of third-party representative to access Taxpayer Access Point (TAP). The taxpayer authorizes the above-designated individual to access TAP on their behalf. TAP discloses confidential tax information on file with the Taxation and Revenue Department. TAP allows for the submission of returns, payments, and refund requests.					
<input type="checkbox"/> C. Designation of third-party representative. The Department is notified that the above-designated individual or firm has been authorized to represent the taxpayer(s) before the Taxation and Revenue Department. The representative is authorized to perform all authorized acts that the taxpayer(s) can perform for the designated tax programs and tax periods, except for acts that only an individual admitted and licensed as a qualified representative in New Mexico can perform.					
<input type="checkbox"/> D. Designation of qualified representative. The Department is notified that the above-designated individual or firm has been authorized and is qualified to represent the taxpayer(s) before the Taxation and Revenue Department in a protest or administrative hearing. i. Designation type: _____ ii. License/Enrollment Number: _____ iii. State of Jurisdiction: _____					
Authorizing Signature(s)					
By signing below, I acknowledge that the authorized individual representative(s) listed above, have the authority to receive Federal and State confidential information on behalf of the taxpayer listed above in tax matters related to this form per NMSA 1978, § 7-1-8 and 26 U.S.C. § 6103. By signing below, I (the taxpayer) am authorizing the New Mexico Taxation and Revenue Department Secretary or Secretary's delegate, to use facsimile, e-mail, or both. I understand that the fax numbers and e-mail addresses above will be used when providing confidential information.					
Printed Name*			Printed Name		
Title			Title		
Signature*		Date*	Signature		Date
• For taxpayers authorizing the Department to disclose return information for a married filing joint personal income tax return, both taxpayers must sign this form. • For a business or estate this form must be signed by a corporate officer, partner, or fiduciary who has been previously identified as such to the Department.					

New Mexico Taxation and Revenue Department
Tax Information Authorization
Tax Disclosure
Instructions

Who is required to submit ACD-31102

The Tax Information Authorization Tax Disclosure form is for a taxpayer who wants to give authorization to access their tax information to an individual who is not their spouse. A taxpayer can choose to authorize an individual or firm to access their tax information for filing purposes or research purposes by submitting a completed ACD-31102, *Tax Information Authorization Tax Disclosure*. A separate ACD-31102 is needed for multiple individuals and/or firms.

This form should also be used to update or revoke previously granted authorization to your tax information.

Should you need assistance completing this form or if you have any questions, please contact the Department:

Phone: 1-866-285-2996

Once the completed forms and attachments have been reviewed and processed, the individual or firm will be granted access to your taxpayer information.

Line Instruction

Check the box to indicate if this is a New, Update, Revoke*, or Revoke All* request.

*If you need to revoke access to a previously authorized individual or firm, fill out their information in **Section II: Authorized Representative Information**. If you wish to revoke all access by all authorized individuals or firms select/mark *Revoke All*.

Section I: Taxpayer Information

Provide all required information about the taxpayer. Required information is identified by asterisk (*).

Fill out the following information:

Name(s)*, Doing Business As (DBA), Mailing address*, City*, State*, Zip Code*, Telephone Number, E-mail address, and Fax Number.

A. Tax Identification Number(s)*

Provide all applicable tax identification numbers for the taxpayer.

B. Reporting Period(s)*

If you want your authorized representative to have access to all taxpayer data, current and historical select/mark *All Tax Periods*.

If you want to grant access to a specific time frame, provide that information in the space provided.

Tax Year(s)- provide the tax year or tax years for which you

are granting authorization.

Starting Period/Ending Period- provide both the starting period and the ending period if you are granting access for a specified time frame.

IMPORTANT: The Tax Information Authorization, commonly referred to as a TIA, is valid for three years from the taxpayer(s) signature date. Once that time frame has expired, a new TIA is required.

C. Tax Program(s)

Check all tax programs that pertain to your tax situation. If the tax program is not selected, access will not be allowed, and you will be required to submit a new ACD-31102 for access to be granted. If selecting other, please specify in the space provided.

Section II: Authorized Representative Information

This form allows you to designate a tax authorization to a single individual or firm. If multiple individuals or firms need access to your taxpayer information, you must submit Form ACD-31102 for each individual or firm.

Section III: Information Authorization

A. through D. Please read the checkbox list carefully and mark all that apply to your tax situation. Your selection will determine what level of access your representative will be granted.

D. Designation of Qualified Representative. You must provide the following information if known:

- i. Designation type (Attorney, Certified Public Accountant (CPA), Enrolled Agent, Other-specify
- ii. License Number
- iii. State of Jurisdiction

Authorizing Signature

This form must be signed by the taxpayer or taxpayers, if married filing joint. If this form is being submitted for business or estate, this form must be signed by a corporate officer, partner, or fiduciary.

Form Submission

You can mail or email your completed authorization form to the Department:

Mail: NM Taxation and Revenue Department
Attn: Compliance Registration Unit
PO Box 8485
Albuquerque, NM 87198

E-mail: Business.Reg@tax.nm.gov



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, May 19, 2023 live and on-line via Zoom.

MEMBERS PRESENT: Shelley Barker, Virginia Fell, Sue Pules, Monica O'Connor, Monica Hardeman, Mary Lois Hulsman, Peter Wanco, Sandy Weidner, Richard Wright, Steve Stauss, Nancy Zmarzly, Diane Lynne Shupp, Therese Francis, Earl Collison, Betty Speelman, Sandra Harstad, Barbara Padilla.

Visitors: Cheri Kimbrell & Julie Ashner.

Virtual Attendees: Ellen Briscoe, Cathy Potts, John Niemi, Sandra Westerfeld, & Kathy Ayre.

Guest: Lelah Martinez, IRS Liaison

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

Secretary's Report: Shelley motions to accept the November 2022 Meeting Minutes and Virginia Fell seconded the motion. Motion passed.

Treasurer's Report: Keri Cardona is not present. Sandy Weidner did receive the P&L to use for NMSEA's 2023 Tax Return and will have both available at next month's meeting.

President's Report: Peter Wanco addresses issues with NM Taxation & Revenue letters requesting various documentation from Taxpayers as proof of Identification.

Team Reports:

Education: Today's increase of live attendees is an encouragement for Golden Corral's Management and ensuring continual use as NMSEA's monthly meeting room. The Education Committee continues to search for alternative options. Education for NMSEA's monthly meetings is established. The October Conference is set for October 18th and 19th at the Marriott Courtyard. The Education topics will be Ethics, Farms & Ranches, Foreign Source income and the Corporate Transparency Act. Education on 1098Ts and Military Retirement pay under the new law was requested. NM does not consider Military Retirement as Community Property Income for tax. Members voted to move the NMSEA September meeting from the 15th to the 22nd due to the Business Tax Return deadline on the 15th. A big thanks to Sandy Weidner and Therese Francis for holding Roundtables during tax season.

Legislative: Shelley Barker and Sandy Weidner will be going to Washington, DC to attend NAEA Fly-in to meet with Legislators and Congressmen.

Membership: Diane L Shupp reminds members that NMSEA telephone line goes to her office. All calls get forwarded to Shelley Barker or Diane L Shupp.

Unfinished Business: None

New Business: The June meeting will be NMSEA Board Member elections and a proposed Bylaw change. Nominees are: Sandy Weidner, President, Diane L Shupp, Vice President, Therese Francis, Treasurer and 3 nominees for the position of Director-at-Large, John Niemi, Keri Cardona, Andrew Rogers. A nominee for Secretary is still needed.

Education Presentation: Lelah Martinez presents discussion of 1099K, IRS Dirty Dozen scams, Verification of Identity letters and Clean Vehicles.

The next NMSEA monthly meeting is scheduled for June 16th. Steve Stauss motions to adjourn meeting and Sandy Weidner seconded. Motion passed. Peter Wanco adjourns meeting at 1:24 pm.

Respectfully Submitted,

Nancy Zmarzly.

Nancy Zmarzly, Secretary



You're invited to the
Pat Jenkins Memorial

Shred Fest 2023

- Hosted by New Mexico Society of Enrolled Agents
- This is your opportunity to have your confidential documents destroyed on site, while you watch, free of charge*.
- Bring up to 50 lbs of personal documents for shredding. Staples are OK, but please remove paper clips.
- **AA Mobile Shredders** will be on location to shred your documents.
***The first 50 lbs. will be shredded absolutely FREE!** If you have more than 50 pounds of shredding, please consider making a donation.

We are proud to offer this service to support our environment, protect your identity and save a tree – all in one day.

Saturday August 26, 2023
10:00AM - Noon

LOCATION: Faith Lutheran Church

10000 Spain Rd. NE
Albuquerque, NM

We will be accepting donations of money or school supplies to help APS students through the Title I program.

Questions? Please call NMSEA (505) 877-1598
Or email nmsea2020@gmail.com

