

May 8, 2020



# NMSEA HAPPENINGS

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

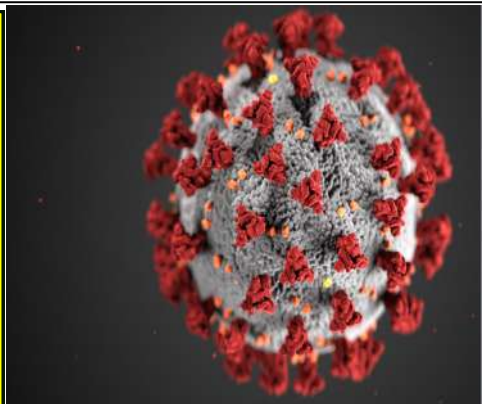
## It's a Great Day to be an EA

Who would have thought? ... Who would have thought that the 2020 tax season would still be ongoing in May, let alone being extended into the middle of July (as of this writing)? ... Who would have thought that a tiny virus in some foreign land, so distant from our shores, would have such a profound impact on the world as we use to know it and how it has changed how we go about our daily lives, and to such a degree and extent? We've all been touched in one way or another! In the not too distant future, I look forward to seeing each and every one of you in person, healthy and well! In the interim, we can stay connected and together, albeit, in a virtual way. Stay Safe ... Stay Healthy!

Peter Wanco, EA, MBA, NTPI Fellow  
President, NMSEA

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

**NMSEA Meeting:  
May 15, 2020**  
Due to restrictions currently in place regarding COVID-19, this meeting has been changed to a Virtual Meeting using Zoom (see pg 7-8). One hour of Continuing Professional Education (CPE) will be provided free.



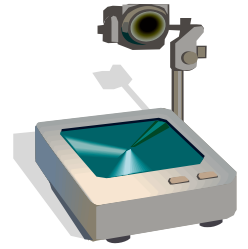
**SPEAKER**  
Sandy Weidner, EA, ABA,  
NTPI Fellow  
"CARES Act and SECURE Act"

NMSEA Board: PRESIDENT: Peter Wanco, EA, MBA, NTPI Fellow VP: Sandra Weidner, EA, ABA, NTPI Fellow  
SECRETARY: Lynne Shupp, EA, RFC TREASURER: Keri Cardona, EA  
DIRECTORS-AT-LARGE: Virginia Fell, EA and Monica Hardeman, EA, NTPI Fellow

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

**FROM THE EDUCATION COMMITTEE:**

Shelley Barker, Steven Stauss, Monica Hardeman, and Troy Scott

**NMSEA Monthly Meeting**

June 19, 2020 TBA

**Important Dates to Note on Your Calendar**

At the present time, no important dates to note on your calendar.

Due to the COVID-19 pandemic, the 2020 NAEA Leadership Summit, including APEX and Congressional Fly-In Day in May are canceled.

2020 NAEA National Conference in Scottsdale, AZ Aug 2-6, 2020 has been canceled.

NMSEA Annual Convention with NMSEA 35th Anniversary Celebration Luncheon is planned for October 2020. (Keep your fingers crossed)

**Enrolled Agent Testing**

<https://www.irs.gov/tax-professionals/enrolled-agent-news>

**Special Enrollment Exam Delays and Cancellations**

Due to the COVID-19 global pandemic, Prometric's test centers in the United States and Canada are closed through May 31,

2020.

**Enrolled Agent Renewal**

Renewal cycle: every 3 years based on last digit of SSN. See Circular 230 Section 10.6(d) for details.



NAEA 2020-21 Board of Directors election ended December 16, 2019. New BOD scheduled to be installed in May 2020---Donald Rosenberg, EA - President; David Tolleth, EA - President Elect; Kathy Brown, EA - Secretary; Directors: Kerry Freeman, EA; Lori Carpenter, EA; Jeff Gentner, EA; Tracey Ann Gordineer, EA; and Lynn Jacobs, EA.

## Educational Opportunities

The **New Business Workshop** presented by NM Taxation & Revenue is a comprehensive look at the Combined Reporting System (CRS) for Gross Receipts, Withholding and Compensating Tax programs. We will discuss 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. In addition to the state CRS we have a volunteer CPA discuss federal tax issues (i.e. reporting forms, Self-Employment Tax and Estimated Tax) and good business practices (i.e. good record-keeping).  
<http://www.tax.newmexico.gov/Businesses/workshops.aspx>

March 11, 2020

### Small business workshops suspended

*Tax and MVD customers also urged to consider on-line services*

As part of the state's efforts to limit public gatherings in response to the COVID-19 virus, the Taxation and Revenue Department is suspending its public tax workshops for small businesses until further notice.



### COVID-19 UPDATE

The safety and well-being of the **IRS Nationwide Tax Forum** attendees and team members is our highest priority. We are monitoring conditions as well as notifications from federal and local agencies to get the most complete information. Currently, we are several months away from the beginning of the forum season. At this time, the IRS Nationwide Tax Forums are proceeding as scheduled.

In the event any of the forum dates are canceled, there will be an option available for those registered to receive a refund.

We will continue to monitor this situation closely and provide updates as necessary.  
 Last Updated: 4/29/20



Welcome aboard to: Stephen Hardy, EA, Santa Fe.



### First Friday IRS Liaison Conference Call with NM, TX & AZ

Ellen Briscoe, EA, ATA is our representative. Call is usually the first Friday of the month. May call notes were distributed thru Constant Contact to members on May 7, 2020. Comments or questions to Ellen at [ecbtaxpro@comcast.net](mailto:ecbtaxpro@comcast.net)



**IRS Releases sent to members in April 2020 thru Constant Contact:**

*Lisa Novack*

Senior Stakeholder Liaison | IRS Communications and Liaison Outreach | [lisa.a.novack@irs.gov](mailto:lisa.a.novack@irs.gov) | phone: 602-636-9476 | e-fax: (877) 477-8568 |

- IRS Tweets and Newswire - Employee Retention Credit available for many businesses financially impacted by COVID-19 April 1, 2020
- IRS Messages--Social Security Recipients Automatically Receive Economic Impact Payments · IRS issues warning about Coronavirus-related scams April 2, 2020
- IRS Newswire - Follow IRS on social media, sign up for e-news subscriptions for urgent updates on COVID-19, scams and economic impact payment information April 3, 2020
- IRS Tweets for Three New COVID-19 Related Employer Tax Credits April 8, 2020
- IRS COVID-19 Information Package - Economic Impact Payments April 8, 2020
- Update: IRS Operations During COVID-19: Mission-critical functions continue April 10, 2020
- IR-2020-69: Treasury, IRS launch new tool to help non-filers register for Economic Impact Payments April 10, 2020
- Update for tax professionals regarding CAF, IVES April 13, 2020
- IRS News Release - Treasury, IRS unveil online application to help with Economic Impact Payments; Get My Payment allows people to provide direct deposit information and gives payment date April 15, 2020
- PTIN Fee - Proposed Regulations - Public comments due May 8 April 16, 2020
- Economic Impact Payment Resources April 17, 2020
- RP-2020-28, tax return filing procedures for certain individuals who are eligible for the economic impact payment April 20, 2020

IR-2020-76: SSA, RRB recipients with eligible children need to act by Wednesday (APR 22, 2020) to quickly add money to their automatic Economic Impact Payment; IRS asks for help in the 'Plus \$500 Push' April 20, 2020

IRS Webinar: Economic Impact Discussion - THURSDAY, April 23 Apr 21, 2020

Postponed: Economic Impact Payment Discussion webinar April 22, 2020

Weekend Read: Latest and Greatest Info from IRS April 24, 2020

IRS enhances Get My Payment online application to help taxpayers + Partner Toolkit April 27, 2020

@@

NMSEA uses the mass mailer Constant Contact to distribute to NMSEA members important and informative information including

- 1) IRS releases from Lisa Novack, IRS Senior Stakeholder Liaison
- 2) NMTRD releases from Charlie Moore, NMTRD Public Relations
- 3) NMTRD information from Rusvelina Escalante, Tax Practitioner Liaison, NMTRD
- 4) NMSEA Happenings newsletters
- 5) First Friday IRS Liaison Conference Call notes

plus any other important information that should be distributed to NMSEA members as soon as possible.

If an NMSEA member did not receive the above April IRS releases please contact Richard Wright, NMSEA Newsletter Editor at [rwright77@comcast.net](mailto:rwright77@comcast.net).

According to Constant Contact, the average Open/Download rate for the April distributions was about 50% (about 60 of 120 NMSEA members). Some members' Internet Email Providers have problems with mass mailers. The easiest way to solve that problem is to provide Richard Wright at [rwright77@comcast.net](mailto:rwright77@comcast.net) with an alternate email address.

# NMSEA NM Update Jan 6, 2020 + NMSEA Federal Update Jan 7, 2020



Attendees



New Mexico Update Presenter: Stephanie Schardin Clarke, Cabinet Secretary of Taxation & Revenue for NM



New Mexico Update Presenter: NMTRD Representative



New Mexico Update Presenter: Aysha Mora, Dir, Audit & Compliance Div, NMTRD



New Mexico Update Presenter Rusvelina Escalante, Tax Practitioner Liaison, NMTRD



New Mexico Update Presenter: NMTRD Representative



Federal Update Presenter: Larry Zimble, MST, EA, MISEA

65 Attendees for NM Update & 45 Attendees for Federal Update

**NMSEA's May Monthly Meeting**  
**5/15/2020**  
**Virtually presented through Zoom**

Ideally you should use a computer with camera and microphone capabilities. However, any device should work (I pad, Surface, cell phone, etc) but the quality might not be as good. You can also call into the meeting using a regular phone.

To enter the meeting, you can either:

1. Click on the Zoom link that has been provided (cut & paste would also work) or
2. Go to Zoom.us and click on the "Join a Meeting". You will then be asked for the meeting number and the meeting password.

If you have never attended a Zoom meeting, you will be asked if you want to download the Zoom application. This app is free and should only take a few moments to install. Follow the prompts to enter your name and leave your audio and video on.

While you are waiting for the meeting to start, you can test your microphone to make sure that the audio is functioning correctly.

The meeting will open up at 11:45 AM and all of the attendees will be allowed to enter. You can use this time to wave & chat and smile at each other. Any questions that you have about the Zoom application can be answered. The President will call the meeting to order at Noon and all of the attendees will be muted at that time. Not to worry though as there will be opportunity to ask questions or add to the discussion.

After the business portion has been concluded, Sandy Weidner EA, ABA will offer a class about the CARES Act and the SECURE Act. A 1hr CPE credit will be available to those who choose to stay and watch the presentation. Yes, thanks for asking, there will be a couple of polling questions ..... per IRS requirements. There is absolutely no charge for the education credit. Unfortunately, you will not be able to earn the CPE credit if you are using a regular phone and only have the ability to listen to the presentation.

At the conclusion of the meeting/presentation, participants will be asked to critique the session via email and to offer any alternative means of holding subsequent meetings.

So plan to join and to bring a beverage and/or your lunch and hang out virtually with NMSEA. This is a new adventure for your Education Team so please be patient. It might not go as smoothly as we would like it to. We will welcome your suggestions & criticisms.

Thank you,  
Your Education Committee  
Shelley Barker, EA  
Monica Hardeman, EA  
Troy Scott, EA  
Steve Stauss, EA

## Your Zoom Meeting Invitation

NMSEA is inviting you to a scheduled Zoom meeting.

Topic: NMSEA Monthly Meeting 5/15/2020

Time: May 15, 2020 11:45 AM Mountain Time (US and Canada)

To Join Zoom Meeting either click on this link

[https://us02web.zoom.us/j/85744716986?  
pwd=UHRGNzNiNEFTM2FhNU01MEZCWmVLUT09](https://us02web.zoom.us/j/85744716986?pwd=UHRGNzNiNEFTM2FhNU01MEZCWmVLUT09)

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

Meeting ID: **857 4471 6986**

Password: **642971**

If you wish to join using a regular phone, dial one of the following numbers.

+1 346 248 7799 US (Houston)

+1 669 900 9128 US (San Jose)

+1 253 215 8782 US (Tacoma)





STATE OF NEW MEXICO EXECUTIVE OFFICE SANTA FE, NEW MEXICO

# Proclamation

*WHEREAS, the enrolled agent profession dates back to 1884 when, after questionable claims had been presented for Civil War losses, Congress acted to regulate persons who represented citizens in their dealings with the U.S. Treasury Department; and*

*WHEREAS, enrolled agents have been important both to the New Mexico taxpayers and the New Mexico Taxation & Revenue Department; and*

*WHEREAS, enrolled agents assist taxpayers with issues from the annual compliance filing of their tax returns to more complex issues of audit, liens, levy, appeals and collections; and*

*WHEREAS, there is an active movement across the nation to recognize the enrolled agent; and*

*WHEREAS, enrolled agents are licensed by the federal Department of the Treasury and are authorized to be agents for taxpayers wherever the IRS has a presence; and*

*WHEREAS, their knowledge, professionalism and integrity make the enrolled agents "America's Tax Experts":*

*NOW THEREFORE, I, Michelle Lujan Grisham, Governor of the State of New Mexico, do hereby proclaim February 10<sup>th</sup> through 17<sup>th</sup>, 2020 as;*

## **"ENROLLED AGENTS WEEK"**

*throughout the state of New Mexico.*

*Done at the Executive Office this  
17<sup>th</sup> day of January, 2020.*

*Attest:*

*Maggie Toulouse Oliver*  
Maggie Toulouse Oliver  
Secretary of State

*Witness my hand and the Great Seal  
of the State of New Mexico.*

*Michelle Lujan Grisham*  
Michelle Lujan Grisham  
Governor





2019 NMSEA pins and mousepads are in! Members get one free and only \$5 for extras or for non-members! Sandy Weidner will be distributing them as she sees members and they can contact her if they want to buy one at: [sweidner45@comcast.net](mailto: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](mailto: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.