

May 12, 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 in June—Volunteers Welcome

Educational Opportunities—NAEA & NMTRD

Pacific Northwest Action Wednesday (PNWAW) IMRS Call for May 17, 2023 (will be sent to members as a Constant Contact distribution after May 17)

Attachment 1: Flyer for Lelah Martinez presentation at May 19, 2023 NMSEA monthly meeting

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

If you're reading this issue of NMSEA Happenings, it means you've made it through tax filing season 2022. Notice, however, I did not say unscathed or in need of some type of physical medical care or psychological diagnosis. For me, this has been one of the more challenging tax seasons in recent memory ... except for last year, and the year before, and the year before that. Those other years all had reasons unto themselves, like Covid-19, and stimulus payments, other payments, and expanded tax credits. In my non-humble opinion, this was the year of procrastinators, 'late' procrastinators. I mean April 15th, 16th, 17th, and 18th 'late' this year. More so than I can ever remember or, even want to remember. Were our clients lured into believing, hoping, wishing, or even praying that the tax filing deadline would somehow 'magically' be moved back another month, or two, or even three months into the future? After all, they did, in fact, give us four more days this year to file.

Moving on, the month of May is here and May 19th is special this year. Aside from the fact that it's New Moon Friday, it's also our first NMSEA meeting of the year, wherein Lelah Martinez, Senior IRS Stakeholder Liaison, will present on new IRS developments and the upcoming 1099-K reporting for 2023.

From an importance perspective, all NMSEA Board positions are up for election/re-election in June 2023. The nominating committee (Virginia Fell, Cathy Potts, and Barbara Padilla) have been busy calling members and soliciting potential candidates for NMSEA President, Vice President, Treasurer, Secretary, and Director-at-Large positions. Please be respectful of their time and consider volunteering for one of these important positions. Although there are many variations regarding 'many hands make light work', this concept is mentioned in the Bible in Nehemiah, Chapter 3. In a more modern sense, the synergistic effect from two or more individuals working towards a common goal is greater than the sum of many individuals working on separate goals or tasks. Please, if you see fit to do so, volunteer!!! Your NMSEA needs your help and experience to continue as a worthwhile organization.

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

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

NMSEA May Meeting:
 May 19, 2022 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: -
 Lelah Martinez, IRS Senior Stakeholder Liaison, "Form 1099-K plus other topics" see Attachment 1.

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

FROM THE EDUCATION COMMITTEE:

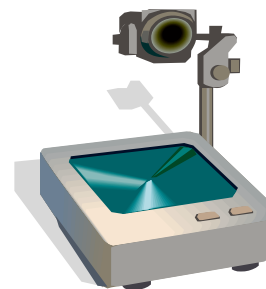
Co-Chairpersons: Lynne Shupp & Shelley Barker, Steven Stauss, Monica Hardeman, and Troy Scott

June 16, 2023 Presenter and Topic TBA

July 21, 2023 Presenter and Topic TBA

Aug 18, 2023 Presenter and Topic TBA

Sept 15, 2023 Presenter and Topic TBA



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 \(irstaxforum.com\)](http://irstaxforum.com)

Important Dates to Note on Your Calendar (continued)



Please share the below tweets on your social media platforms and with your members.

If you are an enrolled agent, CPA or other tax professional in need of continuing education, you'll want to attend the 2023 #IRS Nationwide Tax Forums. Check out this video for more info:

<https://youtu.be/p3lyUkOoZ34>

#TaxPros: Attend the 2023 #IRS Nationwide Tax Forums for live seminars and more from the IRS and its association partners.

<https://youtu.be/p3lyUkOoZ34>

For 2023, the #IRS Nationwide Tax Forums are returning to a city near you, in-person for the first time since 2019. Watch this video for info on how to register:

<https://youtu.be/p3lyUkOoZ34>

#TaxPros: You can attend the 2023 IRS Nationwide Tax Forums in one of these five cities - New Orleans, Atlanta, the Washington, DC area, San Diego and Orlando. Watch this video for more info: <https://youtu.be/p3lyUkOoZ34>

Tags: YouTube, TaxPros, Nationwide Tax Forums

Thank You,
Lelah Martinez
IRS Senior Stakeholder Liaison
6200 Jefferson St NE
Albuquerque, NM 87109
Lelah.L.Martinez@irs.gov
505-737-6215



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

The Society is going to vote for President, Vice President, Secretary, Treasurer and two Directors-at-Large at June 2023 member meeting. BOD installation will be at the July meeting. Please consider stepping forward and volunteering to run for one of the positions. 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

NAEA 2023 Capitol Hill Fly-In Day

Join NAEA in Washington, DC on May 23-24, 2023, for our first Capitol Hill fly-in since the pandemic. Over the course of this two-day event, you will hear from policymakers, IRS staff, and DC thought leaders on the latest with Congress and its impact on enrolled agents. In addition to a variety of panels and engaging speakers, NAEA members will take to Capitol Hill and directly engage with congressional offices on issues important to our industry. The Capitol Hill fly-in presents a unique opportunity to interact with fellow EAs while advocating and taking part in our political process.

Washington, DC



Welcome aboard to: No new members.

NMSEA Federal & NM Update Seminar

Jan 9 - 11, 2023

January 9--Federal Update



Marriott Courtyard



35 in-person attendees



8 virtual attendees



Presenter Allan J 'AJ' Reynolds, EA



Presenter Lelah Martinez, IRS Senior Stakeholder Liaison



Lunch buffet

January 10--Federal Update



35 in-person attendees

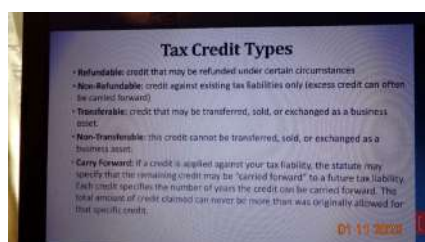
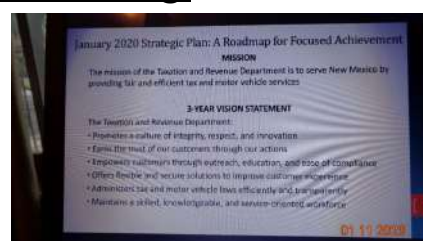
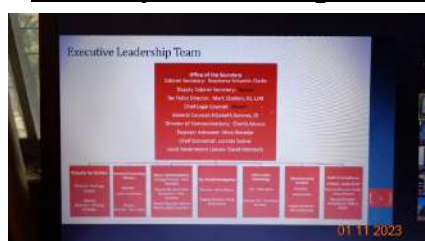


Presenter Allan J 'AJ' Reynolds, EA

January 11--NM Update (Zoom Meeting)



65 virtual attendees



Albuquerque Journal, May 8, 2023

TALK OF THE TOWN

[Rebate tips for low-income taxpayers](#)

BY NOW most N.M. taxpayers are aware of the rebates that went into effect in 2022 and 2023. However, many may not be aware of the enhancements to the Low Income Comprehensive Tax Rebate (rebate) that went into effect in 2021. Prior to 2021, if a taxpayer had modified adjusted gross income of \$22,000 or less, they could be eligible for this rebate.

Effective with the 2021 tax year, this ceiling was raised to \$36,000. In addition, the amount of the credit was increased. For example, a single eligible taxpayer, 65 or older, with modified adjusted gross income of \$20,000 could receive a rebate in 2020 of \$40. For 2021 that amount was increased to \$140. Taxpayers whose modified adjusted gross income is over \$22,000 but under the new ceiling of \$36,000 may not be aware of the enhancements and conclude they are not eligible for the rebate. The general qualifications for the rebate and the items that must be included in modified adjusted gross income can be found in the instructions for the PIT- RC form on the N.M. Tax and Revenue web site.

MICHAEL WINTER
Albuquerque

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Your Zoom Meeting Invitation

NMSEA is inviting you to a scheduled Zoom meeting.

Topic: NMSEA Monthly Meeting

Time: May 19, 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/83601093316>

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

Meeting ID: **836 0109 3316**

Host will admit you.

One tap mobile

+13462487799,,83601093316# US (Houston)

+16694449171,,83601093316# 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

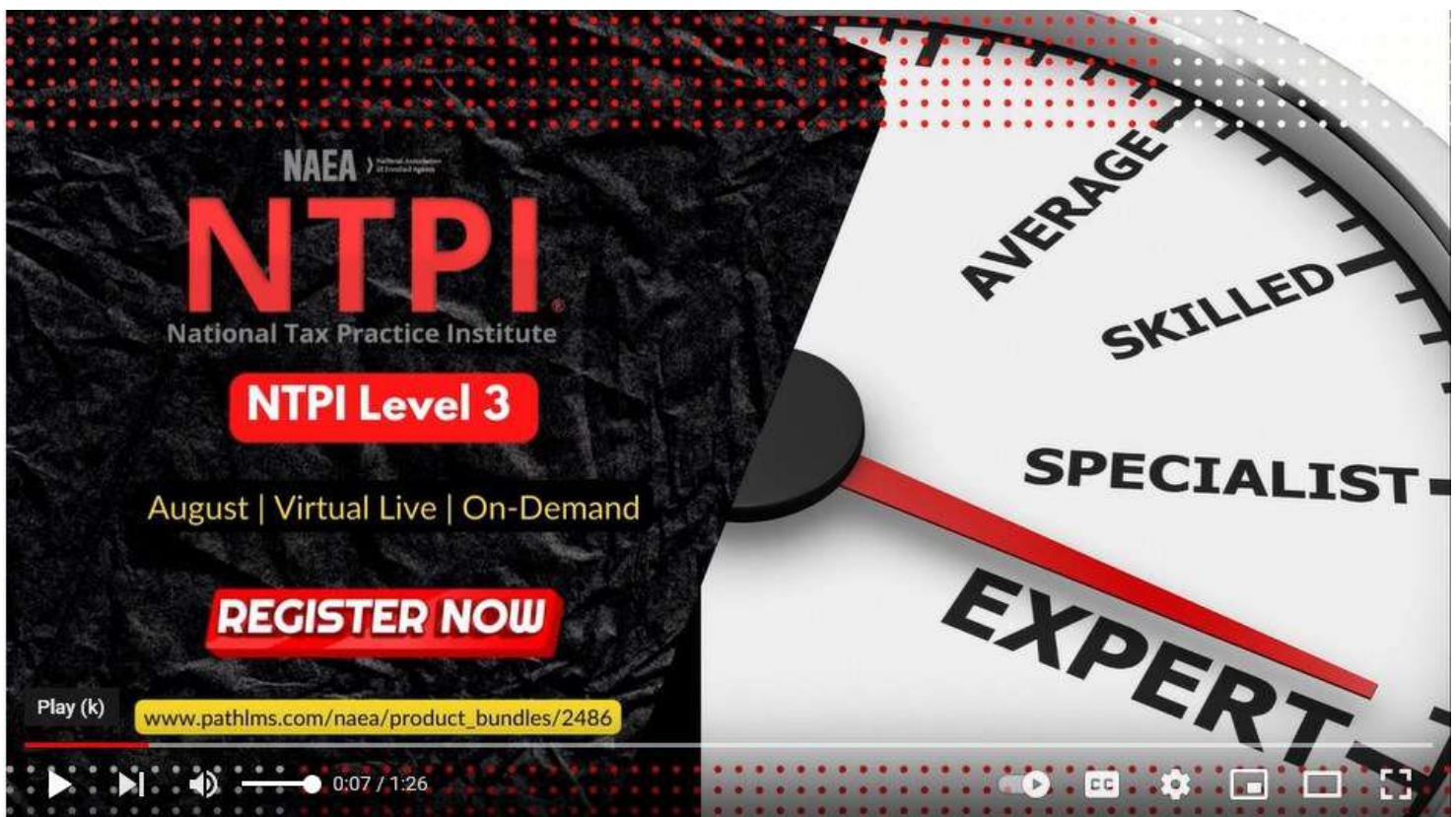
Ellen Briscoe, EA, ATA is our representative. The purpose of the Action Wednesday Call for Area 6 is for the practitioner community to bring issues related to IRS functions to the attention of the IRS. Specific taxpayer issues are not addressed. If you have a problem that may need to be corrected, please bring it to Ellen's attention at: ecbtaxpro@comcast.net April meeting was cancelled. Next meeting scheduled for May 17, 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



Welcome to the new NAEA Continuing Education Portal
<https://www.pathlms.com/naea#>



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/>



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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NMSEA Monthly Meeting
May 19, 2023
Featuring
Lelah Martinez, Senior Stakeholder Liaison

Get your questions answered and an update about:



- Form 1099-K
- Updated FAQs related to the new clean vehicle regulations
- IRS Dirty Dozen list
- ID.me information
- E-signatures for certain forms
- Sharing IRS information on Social Media

In person meeting on 5/19/23 at Noon at the Golden Corral Restaurant in Albuquerque on San Mateo. Come early and have lunch. The cost for lunch is \$15, payable in the back meeting room.

This meeting is also offered on Zoom.

New Mexico Society Enrolled Agents is inviting you to a scheduled Zoom meeting.

Topic: NMSEA May Meeting

Time: May 19, 2023 12:00 PM Mountain Time (US and Canada)

Join Zoom Meeting

<https://us02web.zoom.us/j/83601093316>

Meeting ID: 836 0109 3316

One tap mobile

+13462487799,,83601093316# US (Houston)

+16694449171,,83601093316# US