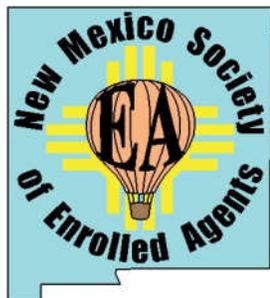


November 12, 2018



NMSEA HAPPENINGS

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

From President, NMSEA

It's a Great Day to be an EA!

I just returned from attending the APEX (Affiliate Presidents' Exchange) meeting in Orlando. This is the 2 day meeting sponsored by NAEA that tries to bring the Presidents of the various "Affiliates" together in order to discuss common challenges, offer solution strategies and to exchange ideas and information. I always seem to come away from this meeting with several ideas and a sense of "batteries recharged." There were lots of good ideas and positive energy being exchanged by the various participants. So, if you were asked the open ended question "I would like NMSEA to". How would you end the sentence? What idea, plan, suggestion, or wish do you have to help NMSEA become a stronger Affiliate?

One of my wishes would be to have several members step up to the plate and volunteer to be a part of our Board of Directors. Our elections are just around the corner and we need to elect a President, Vice President, Secretary, Treasurer and 2 Directors-at-Large. We also need a 3-member nominating committee to start the process. (Pretty Please)

A few more bits of information that I learned from APEX:

- Total contributions to the PAC are over \$100K. That is a new record and at least 30 of our members helped with this fund drive.
- As of 10/22/18 NAEA has 10,674 members. The goal for 2018 is to acquire 1600 new members (currently at 949).
- The next scheduled "Fly In" is May 15 - 19 in Washington, DC.
- Suggestions were offered as to having a membership drive, how to organize a state "Fly In", developing SEE education in local universities, and hosting a tax event.

Hope to see everyone at our November meeting. (Hopefully our speaker will come prepared.)

Shelley Barker, EA, NTPI Fellow

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

Annual NMSEA Meeting:
Friday, Nov 16, 2018
11:30 am at **The Golden Corral**
5207 San Mateo Blvd, ALB.
The Golden Corral charges per person for use of their meeting rooms. **\$15**



Speaker
Shelley Barker, EA
"Tax Court Cases"

NMSEA Board: PRESIDENT: Shelley Barker, EA, NTPI Fellow VICE PRESIDENT: Peter Wanco, EA, NTPI Fellow
SECRETARY: Lynne Shupp, EA, RFC TREASURER: Sandra Weidner, EA, ABA, NTPI Fellow
DIRECTORS-AT-LARGE: Steven Stauss, EA, NTPI Fellow and Barbara Padilla, EA
PAST PRESIDENT: Patricia Jenkins, EA, ABA, NTPI Fellow

NMSEA dedicated phone number (505) 877-1598 & FAX (505) 884-1472

FROM THE EDUCATION COMMITTEE:

Patricia Jenkins, Lynne Shupp, and Barbara Padilla

NMSEA Monthly Meetings

Very Important When Using NMSEA.NET forms to register for NMSEA convention and seminars!!!!

YOU MUST **ALWAYS** FILL OUT YOUR NAME, ADDRESS, MEMBER #, ETC, ON **ALL** REGISTRATION FORMS REGARDLESS OF HOW YOU ARE PAYING---CREDIT CARD OR CHECK

Important Dates to Note on Your Calendar

~~Nov 26, 2018 Mini 4 Hr Seminar "Sharing Income in New Mexico" Shelley Barker, EA & Patricia Jenkins, EA [Not Eligible for Federal CPE] Cancelled. Insufficient enrollment.~~

December 7, 2018 Cyber Ethics, 10 am - Noon; NMSEA NM Update Seminar, 1pm to 5pm. **Important:** Even though the seminar is no charge to members, all attendees must submit a registration form from <https://nmsea.net/workshops-seminars/>

January 10, 2019 NMSEA Federal Update, Time: 8:00 am to 5:00 pm, Speaker: Larry Zimble, EA, Cost: TBD, Venue: Indian Pueblo Cultural Center, Registration form available at <https://nmsea.net/workshops-seminars/> in near future.



[2019 PTIN renewal period underway for tax professionals](#)

WASHINGTON — The Internal Revenue Service today reminded the nation’s more than 768,000 federal tax return preparers that they must renew their Preparer Tax Identification Numbers (PTINs) for 2019. All current PTINs will expire Dec. 31, 2018.

Anyone who prepares or helps prepare any federal tax return, or claim for refund, for compensation must have a valid PTIN from the IRS. The PTIN must be used as the identifying number on returns prepared. Failure to have and use a valid PTIN may result in penalties.

“We ask that you renew your PTIN as soon as possible to avoid a last-minute rush,” said Carol A. Campbell, director, IRS Return Preparer Office. “It’s easy to let this slip as the holiday season approaches.”



accountingTODAY**H&R Block Unveils
Transparent Prices**

By Jeff Stimpson

Published October 30 2018, 10:17am EDT

<https://www.accountingtoday.com/news/h-r-block-unveils-transparent-prices>

Tax preparation giant H&R Block announced that it will offer upfront, transparent prices starting in January for in-person and online prep.

The move comes amid concerns that the changes from the 2017 tax reform act could significantly impact the low end of the tax prep market. Among other things, the rough doubling of the standard deduction is expected to result in significantly fewer taxpayers itemizing, which may reduce the number who seek professional help with their returns.

To fix upfront prices, Block has mapped 4,000 potential tax forms, worksheets and calculations to approximately 25 items based on the consumer's personal situation to determine the price. Taxpayers can determine their base price from one of five categories: "Simple" (W-2 income only), "Complex" (income other than a W-2), "Student/Retired," "Family" (with dependents) or "Homeowner" (paid mortgage interest).

Taxpayers then can determine if they need to file state returns and finally can include the price for any of the approximately 20 additional items such as credits, investments and business income.

"We have spent the last year evaluating all parts of our business, with a specific focus on consumers and their feedback," said H&R Block president and CEO Jeff Jones in a statement. "Our work confirmed that taxes are already a source of anxiety for many consumers, and the tax industry has made it more stressful by not explaining the cost of the services until after the tax preparation was complete."

In most Block offices, prices for a federal return start at \$59; each state return is also \$59.

"We listened to our frontline tax professionals who told us clients expect and deserve to know the price of services before they start," said Karen Orosco, senior vice president of H&R Block's retail business in a statement. "Our tax pros are passionate about finding ways to improve our service and provide us extremely valuable insights based on their firsthand experiences helping clients."

The company is also introducing a "Price Preview" feature on its do-it-yourself online tax prep offering, which will offer ongoing updates to pricing as the taxpayer moves through the preparation process.

NMSEA October 12, 2018 Monthly Meeting



Attendees

VP Wanco conducted the meeting since Pres Barker could not attend. He thanked everyone who contributed items for the auction for their generosity. The auction raised \$2,250 for the NMSEA coffers.

Director-at-Large Stauss continues to work diligently with Senator Candelaria to promote passage of the EA Authority & Authorized Representative Proposal.

Pat Jenkins reported that the Indian Pueblo Cultural Center conceded that the food provided at our convention was poor quality. Management will make amends by not charging NMSEA room rental for the NMSEA NM Update Seminar on December 7. She also announced that the 4 hr Mini Seminar "Sharing Income in New Mexico" scheduled for November 26 had been cancelled due to low registration. A major issue on the plate for NMTRD is the overhaul of the Gross Receipts Tax with major details still to be announced. The NMSEA Education Committee has uploaded all member CPE credits to IRS. Check you PTIN Account at:

<https://rpr.irs.gov/datamart/mainMenuUSIRS.do> . Take advantage of the fillable forms on the nmsea.net website to register for seminars or order Quickfinders.



Lynne Shupp gave a very informative and interesting presentation on "Mortgage Interest---What Is Deductible?"

(Picture Credit: Richard Wright)



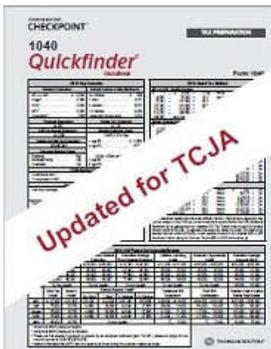
Welcome aboard to: **Melissa Lanser, EA,**
Prescott, AZ



First Friday IRS Liaison Conference Call with NM, TX & AZ Patricia Jenkins, EA, ABA, NTPI Fellow and Ellen Briscoe, EA, ATA are our representatives. Call is usually the first Friday of the month. November call was e-Blasted to members on Nov 9. Comments or questions to Pat at nmseahotmail.com or Ellen at ecbtaxpro@comcast.net



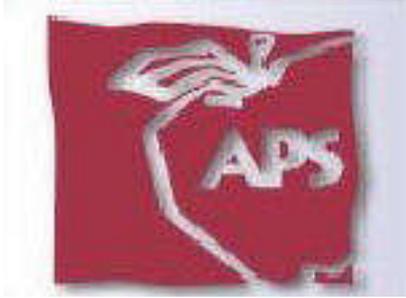
Next edition of IRS *Communications at a Glance*, will be sent to members by E-Blast.



2018 Quickfinder order form (Go to nmsea.net/quickfinder).

The basic order form for QF publications now has separate sections for bound copies and for 3-ring binder copies. The order form is also on the NMSEA website www.NMSEA.net. The NMSEA order cutoff date is November 28, 2018.

If there are Quickfinder publications you want not on our order form or you want to order Quickfinder Bundles, call Quickfinder Sales at (800) 510-8997. Order by phone and mention the NMSEA code “**Q921**”. NMSEA will get credit for your order and that will increase the organizational rebate NMSEA receives from Quickfinder. NMSEA will not get any credit if you mail in your order using the Quickfinder website order form.



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, & 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. During tax season, donations will be accepted at The Tax Professionals Inc, 3311 Candelaria, Suite C, ABQ. After tax season, we will have a collection box at the monthly meetings.



NEW Tax Information Authorization Tax Disclosure ACD-31102 Rev 10/18/2018

(see page 9)

Older versions on file at NMTRD are no longer valid. Tax preparer needs to get the new one signed and submitted to be allowed to represent.

Particularly note the following instructions on the form:

" *Required Fields (If the required fields are not complete, this form is VOID and the taxpayer(s) information will not be shared.)"

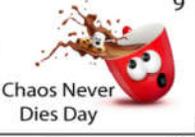
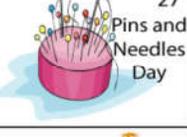
"This form expires one year from the date of the authorizing signature. If your authorized representative changes before that, notify the Department."

Make sure the box near the bottom of the form is checked.

<http://www.tax.newmexico.gov/Tax-Professionals/tax-authorization-procedure.aspx>

November

Adopt a Turkey Month

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
				 1 Men Make Dinner Day	 2 Cookie Monster Day	 3 Sandwich Day
 4 Use Your Common Sense Day	 5 Donut Day	 6 Nachos Day	 7 Hug a Bear Day	 8 Cook Something Bold & Pungent Day	 9 Chaos Never Dies Day	 10 Vanilla Cupcake Day
 11 Origami Day	 12 Pizza with the Works Day	 13 World Kindness Day	 14 Pickle Day	 15 Clean out the Refrigerator Day	 16 Button Day	 17 Homemade Bread Day
 18- Apple Cider Day	 19 Have a Bad Day Day	 20 Peanut Butter Fudge Day	 21 Gingerbread Day	 22 Thanksgiving Day	 23 Sink Day	 24 Share Your Unique Talent Day
 25 Shopping Reminder Day	 26 Cyber Monday	 27 Pins and Needles Day	 28 French Toast Day	 29 Lemon Cream Pie Day	 30 Mason Jar Day	

DailyHolidayBlog.com

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.

Tax Information Authorization
Tax Disclosure

PLEASE TYPE OR PRINT IN BLACK INK

*Required Fields (If the required fields are not complete this form is VOID and the taxpayer(s) information will not be shared.)

This form expires one year from the date of the authorizing signature. If your authorized representative changes before that, notify the Department.

Taxpayer Information					
Name(s)*		Tax Identification Number(s)*		Reporting Period(s)*	
DBA Name(s) (if applicable)		SSN: ____-____-____		Tax Year(s): _____	
Mailing Address*		SPOUSE SSN: ____-____-____		Starting Period: _____	
City*		FEIN: ____-____-____		Ending Period: _____	
State*		NM ID: ____-____-____			
Zip Code*		Tax Program(s)*			
Telephone Number* (____) _____		<input type="checkbox"/> All State Taxes <input type="checkbox"/> Personal Income Tax <input type="checkbox"/> Fiduciary Income Tax <input type="checkbox"/> Corporate Income Tax <input type="checkbox"/> Oil and Gas Taxes <input type="checkbox"/> Other: _____		Combined Reporting System (CRS) <input type="checkbox"/> Gross Receipts Tax <input type="checkbox"/> Compensating Tax <input type="checkbox"/> Withholding Tax	
E-mail Address					
Fax Number					

Authorized Representative(s) Information					
Individual Representative's Name*			Additional Individual Representative's Name		
Mailing Address*			Mailing Address		
City*		State*	Zip Code*		
City		State	Zip Code		
Telephone Number* (____) _____			Telephone Number (____) _____		
E-mail Address			E-mail Address		
Fax Number			Fax Number		

Authorizing Signature(s)

By signing below, I acknowledge that the authorized individual representative(s) listed above have the authority to receive New Mexico 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.

NOTE:

- *For taxpayers authorizing the Department to disclose New Mexico return or 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 Taxation and Revenue Department.

Printed Name* _____

Title _____

Signature* _____ Date* _____

Printed Name _____

Title _____

Signature _____ Date _____

By checking this box, I (the taxpayer) am authorizing the New Mexico Taxation and Revenue Department Secretary or Secretary's delegate, to use facsimile, e-mail, or both, to provide the requested state and federal confidential information available on the taxpayer's New Mexico tax return to the taxpayer or the taxpayer's authorized individual representative listed on this form. I understand that the fax numbers and e-mail addresses above will be used when providing the New Mexico confidential information.

This form can be submitted at any of the district offices listed below:

- | | | | | |
|---|---|---|---|---|
| Taxation and Revenue Department
1200 South St Francis Dr
PO Box 5374
Santa Fe, NM 87502-5374
(505) 827-0951
Fax (505) 827-9876 | Taxation and Revenue Department
Bank of the West Building
5301 Central Ave. NE
PO Box 8485
Albuquerque, NM 87198-8485
(505) 841-6200
Fax (505) 841-6326 | Taxation and Revenue Department
2540 El Paseo, Bldg. #2
PO Box 607
Las Cruces, NM 88004-0607
(575) 524-6225
Fax (575) 524-6224 | Taxation and Revenue Department
3501 E. Main St., Suite N
PO Box 479
Farmington, NM 87499-0479
(505) 325-5049
Fax (505) 599-9703 | Taxation and Revenue Department
400 N Pennsylvania Ave, Suite 200
PO Box 1557
Roswell, NM 88202-1557
(575) 624-6065
Fax (575) 624-6070 |
|---|---|---|---|---|