

Our Presenters

Jason H Daughtry is an Enrolled Agent and co-owner of Affirmative Financial Group LLC in Mays Landing, NJ. He is also co-owner of Affirmative Tax Relief LLC where he works side by side with his wife who is also an Enrolled Agent. Jason began his career in 1998 with H & R Block where he served as a tax specialist and later a tax course instructor and has been specializing in IRS and state representation since 2012. He is also an NTPI Fellow, class of 2014. Jason enjoys spending much of his time mentoring Enrolled Agents and other tax professionals in the ways of representation and being advocates for the taxpayer. Jason is a member of the National Association of Tax Professionals, the American Society of Tax Problem Solvers, and the American Bar Association.



Cynthia Adrian has been with the Idaho State Tax Commission for many years, starting as an auditor with the Tax Discovery Bureau, then moving to Income Tax Audit, Multistate Income Tax Audit, and finally finding a home in Tax Research. Cynthia is a graduate of Boise State University having earned both a Bachelor's and Master's degree in Accounting. Cynthia has provided income tax presentations to numerous groups including the Idaho Society of CPAs and also the Idaho State Legislature.

Jody Stamback, IRS After a short IRS reorganization period, we welcome Jody back as Idaho's Senior Stakeholder Liaison (and Utah). He works with Practitioner and Industry groups in helping to share information to and from the IRS and its external stakeholders. Jody graduated from Weber State University with a BS in Business Management in 1984 and started his IRS career in 1989 with the Ogden Campus. He worked in many different functions until leaving the Campus in 1995 to work as a Tax Auditor in the Salt Lake City District Office.



2024 IATC Convention

June 12 - 14
Boise, Idaho

Jason Daughtry, EA
Cynthia Adrian, ISTC
Jody Stamback, IRS

Thursday is Casino Night
Benefiting La Posada
Low Income Tax Clinic



Topics

Introduction to Representation (2 hrs)

This course is designed to introduce the wonderful world of Representation to EAs, CPAs, and attorneys that wish to be advocates for their clients. Get familiar with the structure of the IRS and the basics of engagement with the IRS, as well as with clients, to effectively represent taxpayers. Discover the necessary tools, best practices, and processes needed to get started and grow in this fantastic area of taxation.

Preparer Due Diligence (2 hrs)

This course discusses preparer due diligence requirements under 6695(g). We'll go over the different types of preparer penalties, the four due diligence requirements, and how to bulletproof your office and protect yourself from hefty due diligence violations.

Defending the Tax Preparer in a Preparer Due Diligence Audit (2 hrs)

Tax return preparers have the same rights as taxpayers when it comes to the IRS. Those rights include the right to retain representation. This course will serve as guidance to the EA, CPA, or attorney who chooses to effectively represent their fellow practitioners in due diligence audits. Not only will this course provide the necessary tools to advocate on behalf of the practitioner, it will also help YOU handle your own due diligence requirements properly and with ease.

Determining Injured and Innocent Spouse (2 hrs)

This course explores the ins and outs of injured and innocent spouse. It will cover the general process and filing obligations for obtaining injured and innocent spouse relief, discuss the three different types of relief under IRC 6015, and go into detail how to identify and avoid conflicts of interest between spouses/ex-spouses.

Preparer Due Diligence (2 hrs)

This course discusses preparer due diligence requirements under 6695(g). We'll go over the different types of preparer penalties, the four due diligence requirements, and how to bulletproof your office and protect yourself from hefty due diligence violations.

Idaho State Tax Commission (3 hrs)

Cynthia will be covering our new favorite topic, ABE tax. She will also review Idaho Capital Gains Deduction, First Time Homebuyer deduction, Idaho Medical Savings Accounts and Credit for taxes paid to another state.

IRS (3 hrs)

Jody will be filling us in on what is new with OPR, Annual Dirty Dozen Tax Scams, IRA Legislation, Backlogs and other common misconceptions,



CASINO NIGHT

One of the best ways to get to know others is through PLAY!

Come play with your fellow tax season survivors while supporting the mission of La Posada Low Income Tax Clinic.

Bob Wunderle and his team have provided critical services to Spanish speaking workers in Idaho for over 20 years. They are now serving clients nationwide.

Proceeds will be donated to La Posada Low Income Tax Clinic in Twin Falls. Have some fun and help Bob Wunderle continue serving those who need extra help.

First \$100 of play included in registration, along with 2 Raffle tickets. Additional funny money can be purchased, and comes with additional Raffle tickets.

And wait till you see what we have to Raffle!



2024 IATC CONVENTION

WEDNESDAY - FRIDAY, JUNE 12 -14, 2024

REGISTRATION

Name: _____

PTIN: _____

Email Address: _____

Phone Number: _____

Registration Fee

\$295 IATC member

\$335 Non-member

Registration Fee after May 25th:

\$35 Additional

Casino Night fun and fundraiser

\$75 \$100 of play & 2 Raffle Tickets

Register & Pay Online at www.iatcidaho.org

Register & Pay with Check Mail to:

Idaho Association of Tax Consultants
1613 12th Ave Rd, Ste B
Nampa, ID 83686

A registration confirmation email will be sent after processing your registration.

Register Closes on June 5

CANCELLATION POLICY:

100% refund until June 1st
Non-refundable thereafter

HOTEL ACCOMMODATIONS:

**Holiday Inn
Boise
Sawtooth Room**
2970 W Elder St
Boise, ID 83705

There are a limited number of rooms being offered at a reduced rate. Call Ellen for details 208-860-5378 before May 13th.

Idaho Association of Tax Consultants

Our mission is to support the tax practitioner community by providing continuation education, networking opportunities and a united presentation to taxing authorities and the public.

If you have any questions, call us!
(208) 467-6488

For newsletters, membership and other info, visit our website. www.iatcidaho.com

2024 IATC Convention

11 hours of IRS CE + 3 hours of Idaho CE

Wednesday, June 12

12:30 – 1:00 Registration

1:00 – 4:00 Cynthia Adrian (3 Idaho CE)

4:00 -- 6:00 Mix and Mingle

Thursday, June 13

8:00 – 12:00 Jason Daughtry (4 CE)

12:00 – 1:00 Lunch included

1:00 – 5:00 Jason Daughtry (4 CE)

5:30 – 6:30 Dinner Buffet included

6:30 – 8:30 Casino Night Fundraiser

Friday, June 14

9:00 – 12:00 Jody Stamback, IRS (3 CE)

12:00 – 1:00 Hang out for Q & A

