

Tax Institute 2022

The Internal Revenue Service and the Delaware Division of Revenue are proud to sponsor the 46th Annual Federal and State Tax Institute. The Institute consist of presentations for tax-return preparers and practitioners and will be offered Virtually and In-Person December 2022.

The goal of the institute is to update, clarify, and explain federal and state tax law reporting requirements and any new tax law developments.

Seating is limited and available on a first come, first serve basis. Walk-ins can not be accepted.



DIRECTIONS ACCESSING THE WEBINAR:

The week before the Tax Institute you will receive a Webinar invite. Each individual that has registered for the Tax Institute must log on from their own machine to be able to receive credit for attending.

DIRECTIONS TO LOCATION:

Rehoboth Beach Convention Center
229 Rehoboth Avenue
Rehoboth Beach, DE 19971

From DE-1 take Rehoboth Ave/DE-1 Alt E. Make a left onto 2nd St, then a left onto Rehoboth Avenue. The convention center is located at 229 Rehoboth Avenue.

MATERIALS:

All Tax Institute materials will be available for download. A link will be sent to the registered e-mail address the week before the Tax Institute. **No printed presentations, CDs or Thumbs Drives will be given out this year.** Laptops are not provided but please feel free to bring your own if you wish. Division of Revenue is not responsible for lost or damaged laptops or for supplying batteries, charging stations or extension cords.

CERTIFICATES:

All certificates will be emailed within **2-3 weeks** after the Tax Institute. Please **make sure we have your current email address** if you wish to receive your certificate in a timely manner.

Virtual Attendees:

Each registered individual must log in to the webinar from their own machine if they wish to receive credit. In place of the traditional Sign in and form, we will be doing polling questions. **You must respond to set number of polling questions to receive credit.**

In Person Attendees:

You must sign in and out to receive credit for the Tax Institute. **If there is no sign in or out time listed, we have no way of verifying how many credits you are eligible for and a certificate will not be issued.**

EARN UP TO 8 CPE OR 6 CE CREDITS

CPAs - CPE CREDITS:

Complete attendance during each session is required in order to earn the associated credit. No half or partial credits will be given. CPAs can earn a maximum of eight (8) CPE credits.

EA & AFSP Participants - CE CREDITS:

Complete attendance during each session is required in order to earn the associated credit. No half or partial credits will be given. EA and AFSP Participants can earn a maximum of six (6) CE credits. **When completing the registration form; your name must match the name you used to file for your PTIN#.**

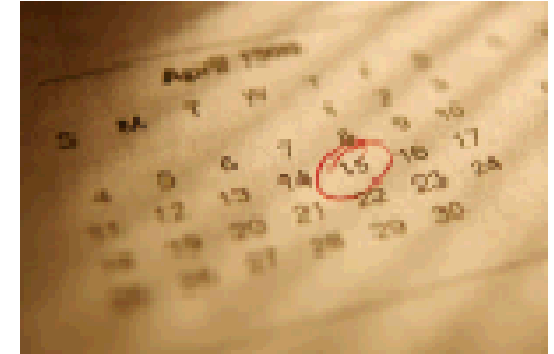
CERTIFICATE OF ATTENDANCE:

Complete attendance during each session is required in order to earn the associated attendance hour. No half or partial hours will be given. Non CPAs can earn a max. of (8) hours of attendance.

Note: CPAs, Attorneys, and others licensed by state boards/organizations should check with their respective boards/organizations to determine if these credits/hours apply toward their continuing education requirements.



WELCOME TO THE 46th ANNUAL FEDERAL AND STATE TAX INSTITUTE



Sponsored by the Internal Revenue Service
and the Delaware Division of Revenue



Delaware Division of Revenue

Tax Institute 2022

SCHEDULED SESSIONS:

- ❖ Delaware Tax Updates
- ❖ 2022 Federal Tax Updates
- ❖ Maryland Legislative Updates
- ❖ Tax Law Changes for Tax Year 2022
- ❖ Looking to Tax Year 2022: American Rescue Plan Tax Changes to the Earned Income Tax Credit and Other Child Related Credits
- ❖ Advocating for Taxpayers with the Taxpayer advocate Service; Stakeholder Liaison Issue
- ❖ Tax Professional Data Breaches and How Tax Pros Can Protect Themselves



SPEAKERS:

Internal Revenue Service

Richard Furlong, Sr. Stakeholder Liaison
Veronica Tubman, Sr. Stakeholder Liaison
Yvette Brooks-Williams, Sr. Stakeholder Liaison
Wendy Figueroa, IRS Local Taxpayer Advocate (DE)

Belfint, Lyons & Shuman, P.A.

Valerie Middlebrooks, CPA, Director
Karly A. Laughlin, CPA, Principal
Michael Kelly, CPA, Principal

Delaware

Kathy Revel, Director of Revenue
Jamie Johnstone, Deputy Director
Terri Arndt, Revenue Production Supervisor
Campbell Hay, Tax Conferee

Maryland

Krista A. Sermon, Comptroller of Maryland

FEE: \$50.00

The Registration fee for the Tax Institute is **\$50.00** and includes materials and a certificate of completion.

Registration check-in and webinar log on begins at 7:30 a.m. The Institute begins **promptly** at 8:00 a.m. and will end at 4:30 p.m.

Seating is limited and available on a first come, first serve basis. Walk-ins not accepted.



ONLINE REGISTRATION:

<https://www.velocitypayment.com/client/delaware/revenue/index.html>

REGISTRATION BY MAIL:

Complete and print the attached form to register. Payment must be in the form of Check or Money Order and made payable to the **Delaware Division of Revenue**. Mailed registration forms and payments should be sent to the address listed on the form. **Mailed registrations must be received by November 23, 2022.**

WITHDRAWALS AND REFUNDS:

Withdrawal and refund requests must be submitted in writing. If written notice or email is received at least five business days before the Tax Institute, the registration fee, will be refunded. No refund will be made after that time.

Stopping payment on checks for registration does not constitute an official withdrawal, and there is a \$30 charge for dishonored checks.

CANCELLATION:

We reserve the right to amend or cancel the Tax Institute. In the event of cancellation, you will receive a full refund.

Registration Form

PLEASE REGISTER ONLY ONE PERSON PER FORM.

Photocopy this form as necessary. Payment must accompany this form. For more information, please call (302) 577-8167 for Jennifer Callahan.

Please indicate if you will attending In-Person or Virtually via the online webinar.

Registration Fee is **\$50.00**.

Wednesday, December 7, 2022 - 8am - 4:30pm

- Rehoboth Beach Convention Center (In Person)
 Online Webinar (Virtually)

Name (Attendee)

Mailing Address

Telephone

E-Mail Address (Required to receive certificate)

PTIN# (Required only for EA and AFSP individuals)

Please check one of the following:

- CPA Enrolled Agent
 Annual Filing Season Program Participant (AFSP)
 Other _____

METHOD OF PAYMENT

Check or Money Order

PAYABLE TO: Delaware Division of Revenue
820 N. French Street
Wilmington, DE 19801
Attn: Carol P. Thomas