

## Tax Institute 2023

The Internal Revenue Service and the Delaware Division of Revenue are proud to sponsor the 47th Annual Federal and State Tax Institute. The Institute consist of presentations for tax-return preparers and practitioners and will be offered In-Person only, Tuesday, December 5, 2023.

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 will be available on a first come, first serve basis.**



**Participants must adhere to the following University of Delaware policies: No Smoking, No Outside Food or Beverages, or Alcohol are allowed at the Clayton Hall Conference Center.**

### DIRECTIONS:

**University of Delaware  
Clayton Hall  
100 David Hollowell Drive  
Newark, DE 19716**

Take I-95 to exit 1B, Merge onto Route 896 North (S. College Ave) towards Newark, at the dead end turn left onto Main Street, continue following Route 896 by making a right onto New London Road and then a right onto Pencader Way. Turn left onto David Hollowell Drive.

### SCHEDULED SESSIONS:

- ❖ Delaware Tax Updates
- ❖ 2023 Federal Tax Updates
- ❖ Estates and Trust Income Taxes Overview
- ❖ Maryland Tax Updates
- ❖ Tax Law Changes for TY 2023 and Form 1099-K Reporting on 2023 Tax Returns
- ❖ Clean Energy Credits: Home Energy and Electric Vehicle Credits
- ❖ Advocating for Taxpayers with the Taxpayer Advocate Service; Stakeholder Liaison Issue Management Resolution System
- ❖ Employee Retention Credit: Basic Rules and Avoiding ERC Scams

### SPEAKERS:

#### **Internal Revenue Service**

Richard Furlong, Sr. Stakeholder Liaison  
Veronica Tubman, Sr. Stakeholder Liaison  
Yvette Brooks-Williams, Sr. Stakeholder Liaison  
Leslie Chambers, Sr. Stakeholder Liaison  
Wendy Figueroa, IRS Local Taxpayer Advocate

#### **Belfint, Lyons & Shuman, P.A.**

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

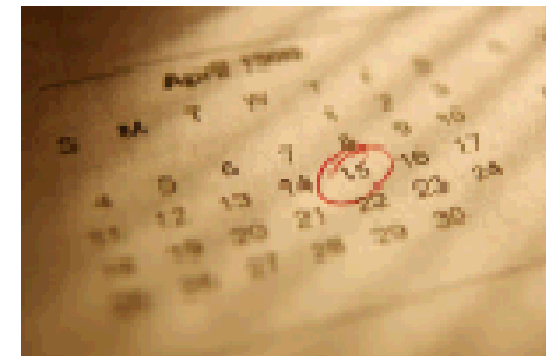
#### **Delaware**

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

#### **Maryland**

Krista A. Sermon, Deputy Director, Legal Div.

## **WELCOME TO THE 47<sup>th</sup> ANNUAL FEDERAL AND STATE TAX INSTITUTE**



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



**Delaware Division of Revenue**

## 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.

### **In-Person Attendance Requirement:**

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 when filing 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.

## 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.

## LUNCH:

**A BBQ Nation Buffet will be available for an additional cost of \$25.00. Lunch can only be purchased at the time of registration.**

Lunch includes: BBQ Spiced Shredded Chicken, Sliced Beef Brisket, Macaroni and Cheese, Bacon & Onion Green Beans, Old-Fashioned Coleslaw, Corn Muffins, and Assorted Cookies.

## 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 a registration does not constitute an official withdrawal, and there is a \$30 charge for dishonored payments.

## CANCELLATION:

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

## REGISTRATION:

**Tuesday, December 5, 2023 - 8am - 4:30pm**

University of Delaware  
Clayton Hall  
100 David Hollowell Drive  
Newark, DE 19716

### **FEE: \$50.00**

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

Registration check-in 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 will be available on a first come, first serve basis.**

### **LUNCH: \$25.00 (Additional Cost)**

**Please Note: Lunch can only be purchased at the time of registration.**

**REGISTER NOW!**

## ONLINE REGISTRATION:

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

## REGISTRATION BY MAIL:

Is no longer being offered.

For more information, or online registration issues please contact Jennifer Callahan at (302) 577-8167.