

## Tax Institute 2024

The Internal Revenue Service and the Delaware Division of Revenue are proud to sponsor the 48th 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 10, 2024.

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.**



### DIRECTIONS:

**Modern Maturity Center  
1121 Forrest Avenue  
Dover, DE 19904**

#### Directions from New Caste County:

Route 1 South to exit 104, Scarborough Rd. towards Rt. 13/DE-8/N. Dover. Follow Scarborough Rd. which merges into McKee Rd./DE-15 for approx. 3.5 miles. Turn right by the Subway onto Forrest Ave. Modern Maturity Center will be on the right.

#### Directions from Sussex County:

Route 1 North to exit 95, DE-10 towards Dover/Camden. Continue onto S. Bay Rd. then merge onto Rt. 13 N. Use left 2 lanes to turn left on E. Division St. Continue on Division St. as it becomes Forrest Ave. Modern Maturity Center will be on the right.

## SCHEDULED SESSIONS:

- ❖ Delaware Tax Updates
- ❖ Individual & Business Federal Tax Update
- ❖ Estates and Trust Taxes– The Basics
- ❖ Maryland Tax Updates
- ❖ Tax Law Changes for TY 2024
- ❖ New Online Features for Tax Pros:  
Do Business Faster and Easier with IRS Online
- ❖ Advocating for Taxpayers with the Taxpayer Advocate Service; Stakeholder Liaison Issue Management Resolution System
- ❖ Data Security Requirements for Tax Professionals

## 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

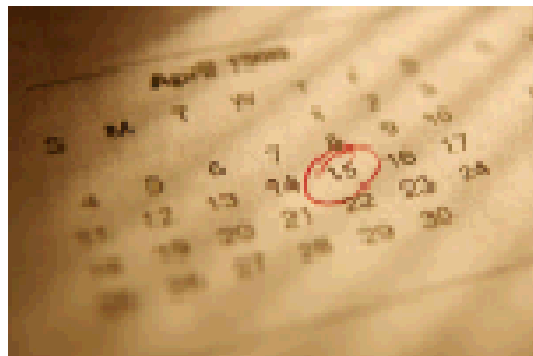
### **Delaware**

Kathy Revel, Director of Revenue  
Jamie Johnstone, Deputy Director  
Campbell Hay, Tax Conferee

### **Maryland**

Krista A. Sermon, Deputy Director, Legal Div.

## WELCOME TO THE 48<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 before the Tax Institute date. **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:

**There is no lunch option this year, however a list of local restaurants will be provided.**



## 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 10, 2024  
8:00am - 4:30pm**

Modern Maturity Center  
1121 Forrest Avenue  
Dover, DE 19904

### **FEE: \$60.00**

The Registration fee for the Tax Institute is **\$60.00** which 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.

Parking is located in the rear of the building. Please enter the building through the door under the red awning.

**Seating is limited and will be available on a first come, first serve basis.**

### **LUNCH: Not Available**

List of local restaurants will be provided.

**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.