

Chapter Office Hours

EMAIL is the best way to
reach us

NewYorkNATP@gmail.com

We are in the office for
phone calls:
Monday-Thursday from
10AM to 4 PM

Did you send in an
application to win a free
conference registration
from the NY Chapter?

Now that the NATP Annual
Conference in Baltimore has
been cancelled, we will
reach out to you about
another option for your
application.

E-News

New York Chapter of NATP
Monthly Newsletter

May 2021

Purchasing a Quickfinder? Order now at tax.tr.com/NATP or use code Q680 and save up to 25% off, plus receive FREE shipping on orders of 3 + products placed by 6/30/21! Order forms are at the end of the newsletter!



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Fax: 888-906-5868



NewYorkNATP.com

This Month's Issue

- Continuing Education requirements
- News from NYS
- Quickfinder Discount

Contributors:

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News from NYS:

New letter this year: Request for Information (RFI)

Requests for Information (Forms DTF-948 and DTF-948-O) are new letters the Tax Department may send you for tax year 2020 and later. If your refund status says we sent you one of these letters, we need additional information to finish processing your return. It is important that you respond by the date noted on the letter to allow us to continue processing your return.

Note: If you did not request electronic communications in your Individual Online Services account before we notified you about this letter, you will not see it in the Message Center on your Account Summary homepage and will receive it by mail only. To receive future correspondence electronically, see Request electronic communications.

Common reasons we may send Forms DTF-948 or DTF-948-O:

We need to verify you reported the correct amount of wages and withholding, and that you allocated correctly to New York State (see Checklist for acceptable proof of wages and withholding).

We need to verify your residency.

You're claiming a credit or tax benefit, and we did not receive a copy of the form with your tax return. (We need a copy of the form to review the credit you are claiming.)

We need to verify your eligibility for the refundable tax credits or itemized deductions you claimed.

You're claiming a dependent deduction and we need to verify the dependent's Social Security number or date of birth (see Checklist for acceptable proof of a child or dependent).

We need information to verify the rental real estate income or loss you claimed.

We need to verify information about partnership, S corporation, or trust income or loss.

Not getting our emails?

Email NewYorkNATP@gmail.com and we will add you to our distribution list.

Not getting Chapter News? Make sure you did not OPT OUT! Login to your natptax.com account, scroll down to the bottom of the home page, Under Customer Center click "Email Preferences" make sure you didn't check off "Don't Send me any emails" and "State Chapter email" is not checked off under "Do Not Send Me"

Continuing education requirements for tax return preparers

Who must complete requirements?

If you meet New York State’s definition of a *commercial tax return preparer*, you have New York State continuing education requirements. These requirements may not be satisfied with either CPE or CLE credits. You can see [Who is a tax return preparer or facilitator](#) to determine whether you meet the state’s definition.

What your requirements are

You must complete free online continuing education courses.

Course requirements		
If you	and you	you must complete the curriculum titled:
did not register in a prior year	are registering for the first time with New York State,	<i>2021 Registration Education Requirements - 16 Qual.</i>
registered in 2019	completed the <i>2019 Registration Education Requirements - 16 Qual,</i>	<i>2020 Registration Education Requirements - 4 CPEs.</i>
registered in 2019	completed the <i>2019 Registration Education Requirements - 4 CPEs,</i>	<i>2020 Registration Education Requirements - 4 CPEs.</i>

Note: The IRS course for tax preparers (*Tax Return Preparer Certification*) **does not count** toward your required New York State hours of coursework.

Keep an eye out!

The NY Chapter is working on our Summer Series to take place this August!

Keep your eyes open for announcements on locations and topics!

Make sure you are on our mailing list to get the announcements!

Purchasing a Quickfinder?

It's always the right time to save! So, we've made it easy to save time finding the right answers to your clients' tax questions and take advantage of special pricing exclusively available to our premier customers.

The more you buy. The more you save. With our quantity discounts, you can choose the products you want in the quantities you need to build your perfect tax quick reference library.

<http://newyorknatp.com/quickfinder-purchase/>

Quickfinder Association Code Q680

See the end of the newsletter for order forms and discount rates!

You also receive a discount when you mention our codes!

The NY Chapter THANKS YOU FOR YOUR SUPPORT!!

NY Chapter Founders Award

Ralph Sommers
2013

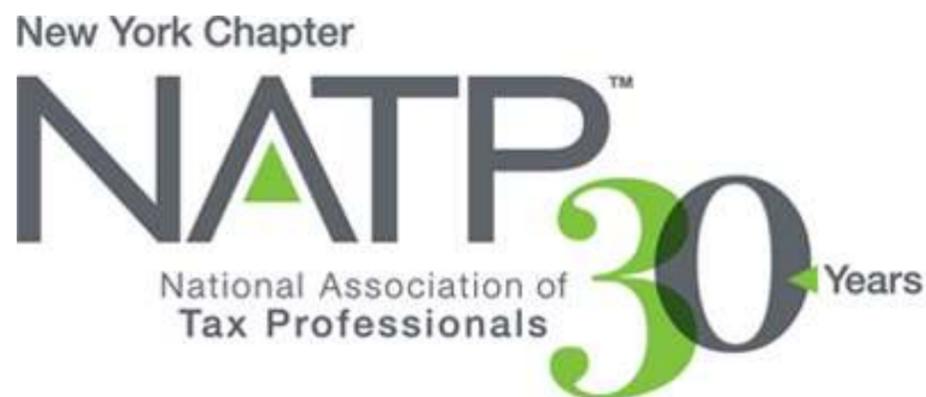
Wendy C. Loomis
2014

Karl Herba
2015

Dwayne "Rocky" Rhodes
2016

Kathryn M. Keane
2017

Richard Rottkamp
2019



Newsletter Committee:

Kathryn M. Keane, EA
Christina Parisi &
Tricia Santana

Did you attend our November webinar series?

The NY Chapter is offering a new scholarship in memory of our late board member, Ralph Sommers.

For our first year, we will randomly draw two winners from the class lists of our November webinars to be given full registration to our two-day Summer Series classes at a location of their choosing.

This offer is only for those who attended our Fall webinars on November 4th, 11th, or 18th of 2020. Anyone who attended more than one webinar will receive entries equal to the number of webinars attended. The December 2020 Annual Meeting and January 2021 webinars are not included in this scholarship. Offer is valid for a two-day Summer Series 2021 class.

Winners will be contacted once the NY NATP Summer Series locations have been confirmed.

National Association of Tax Professionals

ORDER QUICKFINDER® – SAVE UP TO 25%*

Order Quantity	Order by 9/30/21 Save up to 25%*
1	-5%
2	-10%
3 – 5	-15%
6 – 10	-20%
11 – 20	-22%
21+	-25%

Order online at tax.tr.com/NATP

Federal Tax Essentials Library

The 2021 tax season has been one of many changes. From December 2020 legislation that impacts 2020 and future tax year filings (extended provisions, disaster relief, and much more), to ongoing legislation and IRS releases to help taxpayers deal with the impact of the coronavirus pandemic, Quickfinder has been there for you to rely on.

After tax season, it's a great time to consider potential tax-saving opportunities you may have noted when preparing your clients' 2020 returns. And it's time to identify and implement more tax-planning ideas that may fit your clients in 2021. To help you, the Federal Tax Essential Library includes the Tax Planning for Individuals Quickfinder Handbook, the tax planning resource you need to ensure your clients' 2021 tax bills are as low as the tax laws allow. And to help you thrive NEXT tax season, the library includes three of our most popular and most essential federal tax preparation handbooks. Learn more at tax.tr.com/qfbundles.

QUICKFINDER HANDBOOKS AND QUICK REFERENCE GUIDES

	BEST VALUE			BEST VALUE			ORDER TOTAL	BEST VALUE			ORDER TOTAL
	Standard Binding	ProView eBook	3-Ring Binder	Standard Binding	ProView eBook	3-Ring Binder		Standard Binding	ProView eBook	3-Ring Binder	
TAX PREPARATION TOOLS	LIST PRICE			ORDER QUANTITY				TOTAL PRODUCT ORDER \$			
	A	B	C	D	E	F		COLUMN A X COLUMN D	COLUMN B X COLUMN E	COLUMN C X COLUMN F	
EXAMPLE PRODUCT	\$65	\$61	\$68	2	5	6	13	\$130	\$305	\$408	\$843
1040 Quickfinder Handbook	\$65	\$61	\$68					\$	\$	\$	\$
Small Business Quickfinder Handbook	\$65	\$61	\$68					\$	\$	\$	\$
Premium Quickfinder Handbook	\$89	\$85	\$92					\$	\$	\$	\$
All States Quickfinder Handbook	\$99	\$93	N/A			N/A		\$	\$	N/A	\$
Individuals — Special Tax Situations Quickfinder Handbook	\$65	\$61	N/A			N/A		\$	\$	N/A	\$
Depreciation Quickfinder Handbook	\$65	\$61	N/A			N/A		\$	\$	N/A	\$
Quickfinder Annual Tax Update	\$65	\$61	N/A			N/A		\$	\$	N/A	\$
Laminated Tax Tables for Individual Returns	\$18	\$14	N/A			N/A		\$	\$	N/A	\$
Laminated Tax Tables for Business Returns	\$18	\$14	N/A			N/A		\$	\$	N/A	\$
TAX PLANNING TOOLS											
Health Care Reform Quickfinder Handbook	\$65	\$61	N/A			N/A		\$	\$	N/A	\$
Tax Planning for Individuals Quickfinder Handbook	\$65	\$61	N/A			N/A		\$	\$	N/A	\$
Social Security & Medicare Quickfinder Handbook	\$65	\$61	N/A			N/A		\$	\$	N/A	\$
IRA and Retirement Plan Quickfinder Handbook	\$65	\$61	N/A			N/A		\$	\$	N/A	\$
Quickfinder Tax Tips Newsletter**	\$83	\$80	N/A			N/A		\$	\$	N/A	\$
QUICKFINDER ORDER TOTALS											
											(INITIAL ABOVE)

*Savings of up to 25% applies to new orders placed by September 30, 2021. Free shipping applies to three or more products valid through 11:59 p.m. CST, June 30, 2021. Savings promotion excludes Checkpoint, RIA, PPC, and Checkpoint Learning CPE and may not be combined with any other offers.

CALCULATE YOUR QUICKFINDER ORDER DISCOUNTS AND SHIPPING CHARGES

STEP #		
1	Enter your total number of products ordered	QUANTITY =
2	Enter your total QF order dollar amount	\$ =
3	Calculate your discount dollar amount based on the chart above	- \$
4	Calculate Shipping for Quickfinder – \$6.85/Handbook and \$4.25/Tax table	\$ =
5	Calculate Quickfinder Order Total – Add amounts from steps 2, 3 and 4	\$ =

CALCULATE YOUR COMBINED ORDER TOTALS AND SALES TAX

6	Sales tax (apply your rate)	\$ =
7	Grand total	\$ =

CUSTOMER INFORMATION

Customer Number _____

Company Name _____
(If P.O. Box, please include physical address for UPS.)

Name _____

Address _____

City, State, ZIP _____

Email _____
(Required for order confirmation and eBook fulfillment.)

Day Phone (_____) _____

Signature _____

PAYMENT INFORMATION

Note: Make Checks and Money Orders Payable to Quickfinder.

Check **Credit Card** **Money Order**

Note: The charge on your credit card statement will appear as TTA-Research & CPE.

Credit Card Account # **Visa** **MasterCard** **Discover** **AMEX**

_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|_____|

CC Payments – Note: Our policy is to charge your credit card at the time of order.

Expiration Date:

_____|_____|_____|_____|

Month Year

Cardholder's Name (printed as it appears on card)

Cardholder's Signature

3 EASY WAYS TO ORDER

- ▶ Visit tax.tr.com/NATP
- ▶ Call +1 800 431 9025
- ▶ Mail in the completed order form

Payable to: Quickfinder
36786 Treasury Center
Chicago, IL 60694-6700

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PRODUCT UPDATE POLICY

**Automatic Renewals: Select products identified with ** herein are eligible to automatically renew. By initialing the Auto-Renewal box for any eligible product ordered herein, you acknowledge and agree that you are purchasing an automatic renewal subscription to the selected product(s) and that you understand that the subscription to the selected product(s) will automatically renew at the conclusion of your initial term for subsequent terms of one (1) year each, unless and until either party gives the other party written notice of termination before the end of the then-current term. Once a renewal term has commenced, it is non-cancellable. Subscription renewals will be invoiced based on the price in effect at the time of renewal, and the license fees are subject to increase over the previous year's term (plus shipping and handling, if applicable). If a renewal term has begun, requests to cancel will be effective at the end of the current subscription term. Your automatic renewal will include shipments of periodic updates, revised editions, and/or supplements. Notifications of your upcoming renewal term will be sent approximately ninety (90) days in advance of the renewal date.

+ New orders may be canceled within 30 days after purchase. Orders automatically renew prior to the subscription expiration and are non-cancellable after the start date of the renewal term. To cancel, provide written notice of termination before the start date of the renewal term.

Requests for subscription cancellations or product returns may be made by calling +1 800 431 9025.

