

Philadelphia Tri-County Chapter/Southeast Chapter

Tuesday & Wednesday, November 14 & 15, 2023

Springfield Country Club, 400 West Sproul Road, (Route 320)

Springfield, PA 19064, Delaware County

16 Hours FEDERAL Tax Credits —Also Qualifies for 14 Hours CLE Credits for Attorneys*

Registration: 7:30 AM Start/End Time: 8:00 AM—4:00 PM

Speaker: Bill Leonard, CPA, MAFF, CGMA

PA: PX-000501L, NJ: 20CE00159200 NY: 00228 IRS: E3S5R

REGISTER ONLINE
www.pstapcpe.com
 Register by 10/17/23 & Save!

TOPICS: See reverse side of this form

Registration deadline: November 8, 2023

Members only Early Bird Special (registered on or before: 10/17/23):

PSTAP Member: \$375

Regular Rate (registered on or after 10/18/2023):

Members: \$425 **Non-Members: \$490**

- **Registration fee includes Seminar Workbook, Continental Breakfast, Lunch & Afternoon Refreshments**
- REGISTER: Online: www.pstapcpe.com or mail to PSTAP, Attn: Seminar Registrations, 150 Corporate Center Dr., Ste. 205, Camp Hill, PA 17011 or by FAX: 717-614-8663
- Seminar Confirmations—Sent upon registration, via email only—please provide your email address below
- Questions? Contact PSTAP Executive Office at 1-800-270-3352 or by email at info@pstap.org
- Registrations received within 7 days of event may require an additional \$25 charge to special order the manual
- CPE Regulations mandate that attendee must register, attend the full session, and sign out personally
- Refund Policy: Cancellations received after the registration deadline will be refunded less a \$50 service fee.
- No refunds will be issued after 4 p.m. the day before the seminar. No show—no refunds—no exceptions.

Registration Form: (one form per registration—photocopy for additional registrants) **Separate checks for each seminar please!**

 First Name MI Last PSTAP ID #: _____ PTIN #: _____
(see mailing label)

Firm: _____ Phone: () _____

 Street Address City State Zip

 Email Address License Number—CPA/PA—Required

Please Indicate Rate (Include additional \$21 for CLE Credits)*

Members Only Early Bird PSTAP : \$375 **Members Regular Rate: \$425**

Non Member Rate: \$490

Check Enclosed—Payable to PSTAP Philadelphia Tri-County Chapter—Mailed to the above address

VISA/Amex/MASTERCARD Acct # _____

Exp: _____ CVV: _____

Signature _____

Jennings-TaxSpeaker 1040 Tax In Depth Seminar Course Description:

Taxspeaker's 1,100 page course manual supports the Form 1040 with TaxSpeaker's® 1040 Tax in Depth course! Our 2023 course will include detailed coverage, with planning ideas, of the latest changes from the 2022 Secure Act, court cases, IRS changes and all late-season Congressional changes up to the day before the class with special focus coverage of pension changes, high risk areas and our annual review of common preparation issues and new court cases and IRS guidance. Because all speakers are also practicing professionals you receive practical insight and planning issues throughout the two days.

As our flagship course, we take particular pride in its consistent quality and provision of the most thorough and hands-on individual tax preparation guidance. The included manual is bursting with over 1,300 hyperlinked citations to the accompanying free online tax research library. On top of that, it is America's only Form 1040 manual to be regularly and independently recognized as the Top Research Live Course CPE Manual in the United States for six straight years. Its 1,100+ practitioner-written pages are saturated with logically organized guidance to complement the IRS's methods for assembling returns. This manual is provided in both in print and digital formats to course attendees, who also enjoy the value of energetic and knowledgeable teaching from our expert instructors. Participants also receive practical guidance, dozens of checklists, worksheets, and client letters, plus "What's New" information. This seminar also includes a hyperlinked PDF of the manual, four-page laminated desktop reference "Fingertip Facts," and a free 2-hour self-study ethics course.

Upon completion of this course, attendees will be able to properly prepare, report amounts on, file, and deduct disaster losses from Form 1040. We will also teach you how to determine which credits clients may qualify for on their 1040 returns to reduce taxable income, including methods to save for their dependent children's college education and other education credits and deductions. In addition, this course covers appropriate handling of IRS client audits, compliance with Circular 230 ethics regulations, and advice for clients under military special taxation rules.

About the speaker: Bill Leonard CPA, CFFA holds licenses and memberships in Massachusetts, Rhode Island, Alaska and Singapore. He is the sole shareholder of W.A. Leonard & Company, P.C. and PT W.A. Leonard employing sixteen multi-lingual professionals that focus on meeting the needs of small businesses, individuals and fiduciaries. A graduate of Bentley University and Babson College, Bill has been in practice since 1981. He has over twenty years of college and seminar teaching experience.

This course is eligible for CLE credit.

Please ask at the registration table for the form needed to request reporting.