

***AFIT WINTER TAX SEMINAR***

**January 18, 2024**

**8:30 AM to 5:00 PM**

**Desert Willow Conference Center**

4340 East Cotton Center Boulevard  
Phoenix, Arizona 85040

**Register at [www.azitaz.org](http://www.azitaz.org)**

- 8:00 AM – 8:25 AM LOGIN / REGISTRATION  
8:25 AM WELCOME
- 8:30 AM - 9:20 AM ARIZONA DEPARTMENT OF REVENUE – FILING SEASON UPDATE  
*Rob Woods* *AZ DOR*
- 9:25 AM – 10:15 AM INTERNAL REVENUE SERVICE - UPDATE  
*Melissa Chapman* *Local Taxpayer Advocate*
- OR  
8:35 AM – 10:15 AM BREAKOUT *Katie Gudgel* *EA*  
*Arizona Tax Preparation – Unusual Items*
- BREAK 10:15 – 10:35
- 10:40 AM – 12:20 PM ANNUAL FEDERAL TAX UPDATE  
*Edward Zollars* *CPA*
- 12:20 PM – 1:10 PM LUNCH
- 1:10 PM – 2:00 PM RETIREMENT OPTIONS FOR BUSINESS TAXPAYERS  
*Yesenia Simmons, CPA & Michelle Moses*
- 2:00 PM – 2:50 PM PRACTICING ETHICALLY – CONSIDERATIONS WITH CHATGPT  
*Jack Wood* *EA*
- OR  
1:10 PM – 2:50 PM BREAKOUT *Tracy Essig* *ATTORNEY*  
*Dischargeable, or Not? Taxes and Bankruptcy*
- BREAK 2:50 – 3:10
- 3:10 PM - 4:00 PM TERMINATION OF LLC OR S-CORP IN ARIZONA  
*Gregory Robinson* *ATTORNEY*
- 4:00 PM – 4:50 PM THINKING BEYOND TCJA  
*Ed Zollars* *Thala Taperman Rolnick* *Yesenia Simmons*

**PLEASE NOTE; SPEAKERS AND SUBJECTS MAY CHANGE DUE TO AVAILABILITY**

4 hours CPE – Tax Law; 3 hours CPE – Update; 1 hour CPE - Ethics

***NOTE: Some sessions focused solely on Arizona state tax issues may not qualify for Enrolled Agent Circular 230 CPE credit.***

## **Why YOU should attend this AFIT Winter Tax Seminar:**

- **Timely Topics presented by knowledgeable practitioners.**
- **Option to attend in person or on-line.**
- **Updates from Internal Revenue Service and AZ Department of Revenue.**
- **Opportunity for in-person attendees to meet with Taxpayer Advocate Service representatives or Account Resolution advisors from DOR on problem cases. Bring properly-executed, signed Forms 2848 or AZ Form 285.**
- **Annual Federal Tax Update with Ed Zollars, CPA. Expanded to two hours, and may include updates on Corporate Transparency Act, FinCEN reporting, 1099-K reporting, etc. Be ready!**
- **BREAK-OUT SESSIONS ARE BACK, for in-person attendees. Two, two-hour sessions are available. One session will run from 8:30 until 10:15, and the other will begin at 1:10, and end at 2:50. ONLY IN-PERSON ATTENDEES WILL BE ABLE TO OPT FOR THE BREAK-OUTS. WE ARE UNABLE TO STREAM THE BREAK-OUT SESSIONS FOR VIRTUAL ATTENDEES.**
- **A discussion of tax planning tips for business taxpayers, utilizing enhanced retirement plans and techniques. Yesenia Simmons, CPA, & Michelle Moses.**
- **A special tax planning resource, Thinking Beyond TCJA, will explore some issues that may be important to discuss with clients during this filing season.**
- **Downloadable course materials: AFIT will make available downloadable seminar materials for ALL technical topics to save on your laptop, tablet or similar device. You may print the materials for your future reference.**
- **Desert Willow Conference Center is a clean, modern facility with excellent, healthy food choices, and safe, convenient and free parking. Meals and breaks are included in the registration fee.**
- **AFIT seminars provide high-quality tax education in a professional setting.**
- **In-person attendees will have an excellent opportunity for networking.**
- **Easy on-line registration**
- **GREAT CPE VALUE – 8 hours of CPE for less than \$200.**

**20% Discount for Early Registration: Register and pay on or before Thursday, January 11th, 2024 and save.**

**Seminar/Webinar cost: \$249 (\$199 on or before 11:00 PM January 11,)  
Last day to register: January 15, 2024 by 11:00 PM**

**[Click Here to Register](#)**

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***Break-out sessions***

<b>8:35 – 10:15</b>	<b><u>Arizona Tax Preparation – Unusual Items</u></b> <i>Katherine Gudgel</i>	<b>EA</b>
<b>1:10 – 2:50</b>	<b><u>Dischargeable, or Not? Tax Debt in Bankruptcy</u></b> <i>Tracy Essig</i>	<b>Attorney</b>

**NOTE:** *Break-out sessions will be available to in-person attendees only.  
An in-person registrant will be able to choose either or both of the break-out sessions, in lieu of the sessions in the same time slots in the main space.*