

EDUCATION GUIDE

2021-2022





NOTE FROM THE EDUCATION CHAIR

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2020 was not the year any of us expected, to say the least. Navigating a global pandemic hasn't been easy on any of us, and I want to take a moment to recognize those who have lost their lives due to COVID 19, including some of our beloved MSATP members.

With that being said, it's important for us to reflect upon what the last year has taught us. First and foremost, it's inspiring to note how resilient we are. In spite of the challenges we have faced, we are still here; we are ready to take on the new normal in this changed world.

The Maryland Society of Accounting and Tax Professionals is proud to be a part of 2021 for professionals like you. We would be remiss to proceed without thanking **YOU**, our committed members and seminar attendees, for supporting us this past year.

We want you to know that our goals are more fervent this year. We will strive to help you create deeper connections, access up-to-the-minute legislative updates that impact the profession, and make the fulfillment of your CPE requirements a breeze. We are committed to your health, safety, and wellness — rest assured we will follow all guidelines and regulations at our upcoming in-person events.

We look forward to seeing you in-person (and virtually) this year! If you have questions about the upcoming seminar season or need any assistance, you may reach us directly at info@msatp.org or by calling **(800) 922-9672**.

Thank you again for allowing us to serve you, and we look forward to making 2021 a year of phenomenal growth and boundless opportunities!



With Appreciation,

Robert Medbery, CPA

Education Chair, 2021-22

4 EASY WAYS TO SIGN UP

- Register online by visiting msatp.org/seminars
- Call **(800) 922-9672**
- Fax completed form to **(443) 881-4146**
- Mail completed form to: **10630 Little Patuxent Pkwy., Ste. 146 Columbia, MD 21044**

CHOOSE YOUR DESIGNATION/REGISTRATION!

- Certified Financial Planner
- Certified Public Accountant
- Enrolled Agent
- Annual Filing Season Program
- MD Registered Tax Preparers

MARYLAND SOCIETY OF ACCOUNTING & TAX PROFESSIONALS, INC.

10630 Little Patuxent Parkway, Suite 146, Columbia, Maryland 21044
(800) 922-9672 | Fax: (443) 881-4146 | msatp.org | info@msatp.org





1. WINE DOWN WITH MSATP

JUNE 2, 2021 • 6-8 P.M. • BERLIN, MD

We invite you to take one deep exhale and one even bigger sip of wine at Windmill Creek Vineyard & Winery at the close of tax season! Enjoy an evening of wine tasting with your friends and fellow professionals. For pricing information and additional details, visit msatp.org/seminars. Must be 21 and older. *Subject to availability.*

2. EMPLOYEE TO ENTREPRENEUR

JUNE 15, 2021 • 5-7 P.M. • ZOOM WEBINAR

At some point, many accounting & tax professionals have a side business to bring in supplemental income and to fulfill their entrepreneurial passions. But building your own firm may seem a bit scary at the moment – where do you start? How do you get clients? What kind of income can you generate? We tackle these questions and more...



3. MT. VERNON ESTATE TOUR

OCTOBER 20, 2021 • MT. VERNON, VA

From the mansion to lush gardens and grounds, intriguing museum galleries, immersive programs, and the distillery and gristmill, spend the day at the historic home of America's first president! For pricing information and additional details, visit msatp.org/seminars. *Tours are subject to availability.*

4. INTERVIEW BOOTCAMP

SEPTEMBER 2021 • COMING SOON

Looking to enter the workforce soon? Have you struggled with interviews, or do you feel underprepared when you think about interviewing for a potential position within an accounting or tax firm? You're not alone. Many new graduates and job candidates feel this way. That's why MSATP is offering this exclusive, interactive event!

ENJOY SAVINGS ON THESE MEMBER-ONLY SEMINARS :

MEMBERS ONLY

TBD (4 CPE)

June 22, 2021 • 8:00 am–12:00 pm

Water's Edge, Belcamp, MD

MEMBER PRICE: \$80

GEAR UP ESTATES & TRUSTS (8 CPE)

October 19, 2021 • 8:00 am–4:15 pm

Highlands at Germantown, MD

MEMBER PRICE: \$200



2021 – 2022 MSATP SEMINAR SCHEDULE

SAVE THE DATES

	DATE	SEMINAR	LOCATION	TIME
	05/25/21	TaxSpeaker Social Security (8)	Clarion Inn FSK, Frederick	8:00 am – 4:15 pm
	05/26/21	TaxSpeaker Complete Retirement Guide (8)	Clarion Inn FSK, Frederick	8:00 am – 4:15 pm
NEW!	06/01/21	Creating a Culture of Metrics and Measurement (2)	Princess Royale, Ocean City	3:00 pm – 5:00 pm
NEW!	06/01/21	Creating a Culture of Metrics & Measurement (2)	Group Internet Based, Webinar	3:00 pm – 5:00 pm
NEW!	06/02/21	TaxSpeaker Security (3)	Princess Royale, Ocean City	2:00 pm – 5:00 pm
NEW!	06/02/21	TaxSpeaker Security (3)	Group Internet Based, Webinar	2:00 pm – 5:00 pm
	06/03/21	TaxSpeaker Preparations, Compilations & Reviews (8)	Princess Royale, Ocean City	8:00 am – 4:15 pm
	06/03/21	TaxSpeaker Preparations, Compilations & Reviews (8)	Group Internet Based, Webinar	8:00 am – 4:15 pm
	06/04/21	OneNote - Your Own Personal Internet (2)	Princess Royale, Ocean City	8:00 am – 10:00 am
NEW!	06/04/21	OneNote - Your Own Personal Internet (2)	Group Internet Based, Webinar	8:00 am – 10:00 am
NEW!	06/10/21	Enrolled Agent Ethics (2)	Highlands at Germantown	10:00 am – 12:00 pm
	06/10/21	Maryland CPA Ethics (4)	Highlands at Germantown	1:00 pm – 5:00 pm
	06/16/21	Maryland CPA Ethics (4)	Doubletree, Columbia	8:00 am – 12:00 pm
	06/16/21	Enrolled Agent Ethics (2)	Doubletree, Columbia	10:00 am – 12:00 pm
	06/16/21	Non-Profit Accounting (2)	Doubletree, Columbia	1:00 pm – 3:00 pm
NEW!	06/16/21	Non-Profit Accounting (2)	Group Internet Based, Webinar	1:00 pm – 3:00 pm
NEW!	06/16/21	Data Security (2)	Doubletree, Columbia	3:30 pm – 5:30 pm
NEW!	06/16/21	Data Security (2)	Group Internet Based, Webinar	3:30 pm – 5:30 pm
NEW!	06/22/21	Topic TBD (4)- Member Only	Water's Edge, Belcamp	8:00 am – 12:00 pm
	09/23-24/21	TaxSpeaker Business Tax In Depth (16)	Clarion Inn FSK, Frederick	8:00 am – 4:15 pm
	09/30/21	TaxSpeaker Business Tax Update (8)	Doubletree, Pikesville	8:00 am – 4:15 pm
	10/19/21	Gear Up Estates and Trusts (8)- Member Only	Highlands at Germantown	8:00 am – 4:15 pm
	10/21/21	Maryland CPA Ethics (4)	Doubletree, Columbia	8:00 am – 12:00 pm
	10/21/21	Enrolled Agent Ethics (2)	Doubletree, Columbia	10:00 am – 12:00 pm
	10/21/21	Mergers and Contingency Planning (2)	Doubletree, Columbia	1:00 pm – 3:00 pm
NEW!	10/21/21	Mergers and Contingency Planning (2)	Group Internet Based, Webinar	1:00 pm – 3:00 pm
NEW!	10/21/21	Firm of the Future (2)	Doubletree, Columbia	3:30 pm – 5:30 pm
NEW!	10/21/21	Firm of the Future (2)	Group Internet Based, Webinar	3:30 pm – 5:30 pm
NEW!	10/25-26/21	TaxSpeaker Business Tax In Depth (16)	Clarion Hotel, Ocean City	8:00 am – 4:15 pm
	10/27/21	TaxSpeaker 1041's for Trusts and Estates	Clarion Hotel, Ocean City	8:00 am – 4:15 pm
	10/29-31/21	Business Builders Connections Conference (13)	Marriott Ocean Suites, Bethany Beach, DE	3 days of Education

2021 – 2022 MSATP SEMINAR SCHEDULE



SAVE THE DATES

DATE	SEMINAR	LOCATION	TIME	
11/02/21	Enrolled Agent Ethics (2)	Clarion Inn FSK, Frederick	10:00 am – 12:00 pm	
11/02/21	Maryland CPA Ethics (4)	Clarion Inn FSK, Frederick	1:00 pm – 5:00 pm	
11/03/21	Construction Accounting (2)	Clarion Inn FSK, Frederick	10:00 am – 12:00 pm	NEW!
11/03/21	Construction Accounting (2)	Group Internet Based, Webinar	10:00 am – 12:00 pm	NEW!
11/03/21	Maryland Income Tax Update (4)*	Clarion Inn FSK, Frederick	1:00 pm – 5:00 pm	
11/03/21	Maryland Income Tax Update (4)*	Group Internet Based, Webinar	1:00 pm – 5:00 pm	
11/09-10/21	TaxSpeaker 1040 In Depth (16)	Clarion Inn FSK, Frederick	8:00 am – 4:15 pm	
11/15/21	Maryland Income Tax Update (4)*	Martin's Crosswinds, Greenbelt	1:00 pm – 5:00 pm	
11/16-17/21	TaxSpeaker 1040 In Depth (16)	Martin's Crosswinds, Greenbelt	8:00 am – 4:15 pm	
11/22-23/21	TaxSpeaker 1040 In Depth (16)	Highlands at Germantown	8:00 am – 4:15 pm	
11/30-12/01/21	TaxSpeaker 1040 In Depth (16)	Martin's West, Baltimore	8:00 am – 4:15 pm	
11/30/21	Delaware CPA Ethics (4)	Clarion Hotel, Ocean City	1:00 pm – 5:00 pm	
12/1-2/21	TaxSpeaker 1040 In Depth (16)	Clarion Hotel, Ocean City	8:00 am – 4:15 pm	
12/03/21	Maryland CPA Ethics (4)	Clarion Hotel, Ocean City	8:00 am – 12:00 pm	
12/03/21	Enrolled Agent Ethics (2)	Clarion Hotel, Ocean City	10:00 am – 12:00 pm	
12/03/21	Maryland Income Tax Update (2)*	Clarion Hotel, Ocean City	1:00 pm – 3:00 pm	
12/7-8/21	Gear Up 1040 Tax (16)	Doubletree, Annapolis	8:00 am – 4:15 pm	
12/13/21	Maryland CPA Ethics (4)	Turf Valley, Ellicott City	8:00 am – 12:00 pm	
12/13/21	Enrolled Agent Ethics (2)	Turf Valley, Ellicott City	10:00 am – 12:00 pm	
12/13/21	Maryland Income Tax Update (2)*	Turf Valley, Ellicott City	1:00 pm – 3:00 pm	
12/13/21	Maryland Income Tax Update (2)*	Group Internet Based, Webinar	1:00 pm – 3:00 pm	
12/13/21	Payroll and 1099 Forms - Are You Reporting Correctly? (2)	Turf Valley, Ellicott City	3:30 pm – 5:30 pm	
12/13/21	Payroll and 1099 Forms - Are You Reporting Correctly? (2)	Group Internet Based, Webinar	3:30 pm – 5:30 pm	
12/15/21	TaxSpeaker Federal Tax Update (8)	Turf Valley, Ellicott City	8:00 am – 4:15 pm	
01/4-5/22	TaxSpeaker 1040 In Depth (16)	Martin's Valley Mansion, Cockeysville	8:00 am – 4:15 pm	
01/5-6/22	TaxSpeaker 1040 In Depth (16)	Clarion Inn FSK, Frederick	8:00 am – 4:15 pm	
01/11/22	TaxSpeaker Federal Tax Update (8)	Highlands at Germantown	8:00 am – 4:15 pm	

() = CPE HOURS

Seminars in Bold are offered as Live and Group Internet Based Webinars at the same date and time.

*Per Maryland Individual Tax Preparer Board

Learn more about your speakers: msatp.org/speakers | Program descriptions & objectives: msatp.org/seminars

2021 – 2022 MSATP SEMINAR DESCRIPTION



ACCOUNTING

ACCOUNTING

CPA



Construction Accounting

FACILITATORS Donald Hoffman, CPA

DELIVERY Group Live, Group Internet Based PROGRAM LEVEL Update

HOURS 2 (Recommended) PREREQUISITE Knowledge of Accounting Standards

FOOD INCLUDED Beverages MEMBER \$100 NON-MEMBER \$110



ACCOUNTING

ACCOUNTING

CPA



Non-Profit Accounting

FACILITATORS TBD

DELIVERY Group Live, Group Internet Based PROGRAM LEVEL Update

HOURS 2 (Recommended) PREREQUISITE Knowledge of Accounting Standards

FOOD INCLUDED Beverages MEMBER \$100 NON-MEMBER \$110



ACCOUNTING

ACCOUNTING

CPA



TaxSpeaker Preparations, Compilations and Reviews

FACILITATORS Bob Jennings, CPA, EA

DELIVERY Group Live, Group Internet Based PROGRAM LEVEL Update HOURS 8 (Recommended)

PREREQUISITE Knowledge of Accounting Standards FOOD INCLUDED Continental Breakfast, Two Breaks, Lunch MEMBER \$280 NON-MEMBER \$340



DELAWARE
CPA ETHICS

REGULATORY ETHICS

CPA



Delaware CPA Ethics

FACILITATORS TBD

DELIVERY Group Live PROGRAM LEVEL Update HOURS 4 (Recommended)

PREREQUISITE Knowledge of Regulatory Ethics FOOD INCLUDED Beverages

MEMBER \$160 NON-MEMBER \$180



ENROLLED
AGENT ETHICS

REGULATORY ETHICS

A MD EA



Enrolled Agent Ethics

FACILITATORS D. Barry Iacono, EA

DELIVERY Group Live PROGRAM LEVEL Update HOURS 2 (Recommended)

PREREQUISITE Knowledge of Regulatory Ethics FOOD INCLUDED Beverages

MEMBER \$100 NON-MEMBER \$110

NO ADVANCED PREPARATION REQUIRED

LEARN MORE ABOUT YOUR SPEAKERS ONLINE: msatp.org/speakers

PROGRAM DESCRIPTIONS & OBJECTIVES: msatp.org/seminars

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Enrolled Agent



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REGULATORY ETHICS

CPA



Maryland CPA Ethics

FACILITATORS Gary Bulmash, CPA

DELIVERY Group Live **PROGRAM LEVEL** Update **HOURS** 4 (Recommended)

PREREQUISITE Knowledge of Regulatory Ethics **FOOD INCLUDED** Continental Breakfast or PM Break, Beverages **MEMBER** \$160 **NON-MEMBER** \$180



TAXES

CPA MD



Maryland Income Tax Update (4 Hours)

FACILITATORS Sarah Dufresne, Esq; Andrew Maschas - Maryland Revenue Administration **DELIVERY** Group Live, Group Internet Based

PROGRAM LEVEL Update **HOURS** 4 (Recommended) **PREREQUISITE** Knowledge of Maryland Tax Law and Regulations **FOOD INCLUDED** Beverages **MEMBER** \$160 **NON-MEMBER** \$180



TAXES

CPA MD



Maryland Income Tax Update (2 Hours)

FACILITATORS Sarah Dufresne, Esq; Andrew Maschas- Maryland Revenue Administration **DELIVERY** Group Live, Group Internet Based

PROGRAM LEVEL Update **HOURS** 2 (Recommended) **PREREQUISITE** Knowledge of Maryland Tax Law and Regulations **FOOD INCLUDED** Beverages **MEMBER** \$100 **NON-MEMBER** \$110



PRACTICE MANAGEMENT

CPA



Data Security

FACILITATORS John Melloy- Practice Protect

DELIVERY Group Live, Group Internet Based **PROGRAM LEVEL** Update

HOURS 2 (Recommended) **PREREQUISITE** Knowledge of Security Measures **FOOD INCLUDED** Beverages **MEMBER** \$100 **NON-MEMBER** \$110



PRACTICE MANAGEMENT

CPA



Creating a Culture of Measurement and Metrics

FACILITATORS John Kennedy

DELIVERY Group Live, Group Internet Based **PROGRAM LEVEL** Update

HOURS 2 (Recommended) **PREREQUISITE** Knowledge of Practice Management Techniques **FOOD INCLUDED** Beverages **MEMBER** \$100 **NON-MEMBER** \$110

NO ADVANCED PREPARATION REQUIRED

LEARN MORE ABOUT YOUR SPEAKERS ONLINE: msatp.org/speakers

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PRACTICE MANAGEMENT

CPA



Firm of the Future

FACILITATORS Jonathan Rivlin, CPA- The Rivlin Group PC

DELIVERY Group Live, Group Internet Based **PROGRAM LEVEL** Update

HOURS 2 (Recommended) **PREREQUISITE** Knowledge of Practice Management Techniques

FOOD INCLUDED Beverages **MEMBER** \$100 **NON-MEMBER** \$110



PRACTICE MANAGEMENT

CPA



Mergers and Contingency Planning

FACILITATORS Allen Ayers, CPA- Lombardo Ayers & Company

DELIVERY Group Live, Group Internet Based **PROGRAM LEVEL** Update

HOURS 2 (Recommended) **PREREQUISITE** Knowledge of Practice Management Techniques

FOOD INCLUDED Beverages **MEMBER** \$100 **NON-MEMBER** \$110



SPECIALIZED KNOWLEDGE & APPLICATION

CPA CFP



TaxSpeaker Social Security

FACILITATORS Bob Jennings, CPA, EA

DELIVERY Group Live **PROGRAM LEVEL** Update **HOURS** 8 (Recommended)

PREREQUISITE Knowledge of Social Security Laws and Regulations

FOOD INCLUDED Continental Breakfast, Two Breaks, Lunch **MEMBER** \$280 **NON-MEMBER** \$340



TAXES

CPA EA MD A CFP



Gear Up 1040 Tax

FACILITATORS Gear Up Speakers

DELIVERY Group Live **PROGRAM LEVEL** Update **HOURS** 16 (Recommended)

PREREQUISITE Knowledge of Tax Law Regulations **FOOD INCLUDED** Continental Breakfast, Two Breaks, Lunch **MEMBER** \$480 **NON-MEMBER** \$560



TAXES

CPA EA MD A CFP



Gear Up Estates and Trusts *****Members Only*****

FACILITATORS Charles Burdoin, CPA

DELIVERY Group Live **PROGRAM LEVEL** Update **HOURS** 8 (Recommended)

PREREQUISITE Knowledge of Estates and Trusts **FOOD INCLUDED** Continental Breakfast, Two Breaks, Lunch **MEMBER** \$200

NO ADVANCED PREPARATION REQUIRED
 LEARN MORE ABOUT YOUR SPEAKERS ONLINE: msatp.org/speakers
 PROGRAM DESCRIPTIONS & OBJECTIVES: msatp.org/seminars
 Register today online at msatp.org or call (800) 922-9672



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TAXES
CPA EA MD A



TOPIC - TBD ***Members Only***

FACILITATORS TBD

DELIVERY Group Live **PROGRAM LEVEL** Update **HOURS** 4 (Recommended)

PREREQUISITE Knowledge of Tax Law Regulations **FOOD INCLUDED** Buffet Breakfast, Beverages **MEMBER ONLY** \$80



TAXES
CPA EA MD A



Payroll and 1099 Forms - Are You Reporting Correctly?

FACILITATORS Barbara J. Smith, CPA - Island Tax and Accounting LLC

DELIVERY Group Live, Group Internet Based **PROGRAM LEVEL** Update **HOURS** 2 (Recommended)

PREREQUISITE Knowledge of Tax Law Regulations **FOOD INCLUDED** Beverages **MEMBER** \$100 **NON-MEMBER** \$110



TAXES
CPA EA MD A CFP



TaxSpeaker 1040 Tax In Depth

FACILITATORS Bob Jennings, CPA, EA; Bill Leonard, CPA; Terry Bakker, CPA, EA; Gregg Goodsell, EA; Mark Mirsky, CPA; Ron Roberson, CPA **DELIVERY** Group Live

PROGRAM LEVEL Update **HOURS** 16 (Recommended) **PREREQUISITE** Knowledge of Tax Law Regulations **FOOD INCLUDED** Continental Breakfast, Two Breaks, Lunch

MEMBER \$480 **NON-MEMBER** \$560



TAXES
CPA EA MD A CFP



TaxSpeaker 1041's For Trusts and Estates

FACILITATORS Bill Leonard, CPA

DELIVERY Group Live **PROGRAM LEVEL** Update **HOURS** 8 (Recommended)

PREREQUISITE Knowledge of Estates and Trusts **FOOD INCLUDED** Continental Breakfast, Two Breaks, Lunch **MEMBER** \$280 **NON-MEMBER** \$340



TAXES
CPA EA MD A CFP



TaxSpeaker Business Tax In Depth

FACILITATORS Bob Jennings, CPA, EA; Bill Leonard, CPA; Terry Bakker, CPA, EA; Mark Mirsky, CPA; Ron Roberson, CPA; Gregg Goodsell, EA **DELIVERY** Group Live

PROGRAM LEVEL Update **HOURS** 16 (Recommended) **PREREQUISITE** Knowledge of Tax Law Regulations **FOOD INCLUDED** Continental Breakfast, Two Breaks, Lunch

MEMBER \$480 **NON-MEMBER** \$560

NO ADVANCED PREPARATION REQUIRED
LEARN MORE ABOUT YOUR SPEAKERS ONLINE: msatp.org/speakers
PROGRAM DESCRIPTIONS & OBJECTIVES: msatp.org/seminars
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TAXES



TaxSpeaker Federal Tax Update

FACILITATORS Bob Jennings, CPA, EA; Ron Roberson, CPA; Bill Leonard, CPA; Terry Bakker, CPA, EA; Mark Mirsky, CPA **DELIVERY** Group Live **PROGRAM LEVEL** Update

HOURS 8 (Recommended) **PREREQUISITE** Knowledge of Tax Law Regulations **FOOD INCLUDED** Continental Breakfast, Two Breaks, Lunch **MEMBER** \$280 **NON-MEMBER** \$340

TAXES



TAXES



TaxSpeaker Business Tax Update

FACILITATORS Bob Jennings, CPA, EA; Mark Mirsky, CPA; Terry Bakker, CPA, EA; Ron Roberson, CPA; Bill Leonard, CPA **DELIVERY** Group Live **PROGRAM LEVEL** Update

HOURS 8 (Recommended) **PREREQUISITE** Knowledge of Tax Law Regulations **FOOD INCLUDED** Continental Breakfast, Two Breaks, Lunch **MEMBER** \$280 **NON-MEMBER** \$340

TAXES



TAXES



TaxSpeaker Complete Retirement Guide

FACILITATORS Bob Jennings, CPA, EA

DELIVERY Group Live **PROGRAM LEVEL** Update **HOURS** 8 (Recommended)

PREREQUISITE Knowledge of Tax Law Regulations **FOOD INCLUDED** Continental Breakfast, Two Breaks, Lunch **MEMBER** \$280 **NON-MEMBER** \$340

TAXES



TAXES



TaxSpeaker Security

FACILITATORS Bob Jennings, CPA, EA; Ryan Jennings

DELIVERY Group Live, Group Internet Based **PROGRAM LEVEL** Update

HOURS 3 (Recommended) **PREREQUISITE** Knowledge of Security Measures **FOOD INCLUDED** Beverages **MEMBER** \$135 **NON-MEMBER** \$150

TAXES



COMPUTER SOFTWARE & APPLICATIONS



OneNote - Your Own Personal Internet

FACILITATORS Rob Smith

DELIVERY Group Live, Group Internet Based **PROGRAM LEVEL** Update

HOURS 2 (Recommended) **PREREQUISITE** Knowledge of Microsoft One Note **FOOD INCLUDED** Beverages **MEMBER** \$100 **NON-MEMBER** \$110

COMPUTER SOFTWARE & APPLICATIONS



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MEMBERS ONLY BENEFIT: FREE 2 HOURS ETHICS

As a part of your MSATP membership, you are eligible to receive 2 free hours of ethics every year. Please call the MSATP office at (800) 922-9672 for more details and to get registered! This offer is not valid on online registrations and is non-transferable.

LOCATIONS/HOTELS



CLARION RESORT FONTAINEBLEAU HOTEL

10100 Coastal Highway, Ocean City, MD 21842 • (800) 638-2100

ROOM RATE: \$125-\$165 (Oct); \$79-\$119 (Nov/Dec)

10/25-26/21	TaxSpeaker Business Tax In Depth
10/27/21	TaxSpeaker 1041's For Trust and Estates
11/30/21	Delaware CPA Ethics
12/1-2/21	TaxSpeaker 1040 Tax In Depth Maryland
12/3/21	CPA Ethics
12/3/21	Enrolled Agent Ethics
12/3/21	Maryland Income Tax Update

CLARION INN FSK, FREDERICK

5400 Holiday Drive, Frederick, MD 21703 • (301) 694-7500

ROOM RATE: \$109

5/25/21	TaxSpeaker Social Security
5/26/21	TaxSpeaker Complete Retirement Guide
9/23-24/21	TaxSpeaker Business Tax In Depth
11/2/21	Enrolled Agent Ethics
11/2/21	Maryland CPA Ethics
11/3/21	Construction Accounting
11/3/21	Maryland Income Tax Update
11/9-10/21	TaxSpeaker 1040 In Depth
1/5-6/22	TaxSpeaker 1040 In Depth

DOUBLETREE ANNAPOLIS

210 Holiday Court, Annapolis, MD 21401 • (410) 224-3150

ROOM RATE: \$106

12/7-8/21	Gear Up 1040 Tax
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DOUBLETREE COLUMBIA

5485 Twin Knolls Road, Columbia, MD 21045 • (410) 997-1060

ROOM RATE: \$119

6/16/21	Maryland CPA Ethics
6/16/21	Enrolled Agent Ethics
6/16/21	Data Security
6/16/21	Non-Profit Accounting
10/21/21	Maryland CPA Ethics
10/21/21	Enrolled Agent Ethics
10/21/21	Mergers & Contingency Planning
10/21/21	Firm of the Future

DOUBLETREE PIKESVILLE

1726 Reisterstown Road, Pikesville, MD 21208 • (410) 653-1100

ROOM RATE: \$149

9/30/21	TaxSpeaker Business Tax Update
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HIGHLANDS AT GERMANTOWN

20260 Goldenrod Lane, Germantown, MD 20876 • (301) 428-1300

ROOM RATE: \$149

6/10/21	Enrolled Agent Ethics
6/10/21	Maryland CPA Ethics
10/19/21	Gear Up Estates and Trusts MEMBERS ONLY
11/22-23/21	TaxSpeaker 1040 Tax In Depth
01/11/22	TaxSpeaker Federal Tax Update

MARTIN'S CROSSWINDS

7400 Greenway Center Drive, Greenbelt, MD 20770

• (301) 474-8500

ROOM RATE: \$109

11/15/21	Maryland Income Tax Update
11/16-17/21	TaxSpeaker 1040 In Depth

HOTEL: HOLIDAY INN GREENBELT

7200 Hanover Drive, Greenbelt, MD 20770 • (301) 982-7000

MARTIN'S VALLEY MANSION

594 Cranbrook Road, Cockeysville, MD 21030 • (410) 666-1234

ROOM RATE: \$105

1/4-5/22	TaxSpeaker 1040 In Depth
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HOTEL: HOLIDAY INN TIMONIUM

9615 Deereco Road, Timonium, MD 21093 • (410) 560-1000

MARTIN'S WEST

6817 Dogwood Road, Baltimore, MD 21244 • (410) 944-9433

ROOM RATE: \$99

11/30-12/1/21	TaxSpeaker 1040 In Depth
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HOTEL: HAMPTON INN & SUITES

1810 Belmont Road, Baltimore, MD 21244 • (410) 281-1111

PRINCESS ROYALE

9100 Coastal Highway, Ocean City, MD 21842 • (410) 524-7777

ROOM RATE: \$219 - \$279

6/1/21	Creating a Culture of Metrics and Measurement
6/2/21	TaxSpeaker Security
6/3/21	TaxSpeaker Preparations, Compilations & Reviews
6/4/21	OneNote - Your Own Personal Internet

TURF VALLEY RESORT

2700 Turf Valley Road, Ellicott City, MD 21042 • (410) 465-1500

ROOM RATE: CONTACT FACILITY FOR BEST PRICING

12/13/21	Maryland CPA Ethics
12/13/21	Enrolled Agent Ethics
12/13/21	Maryland Income Tax Update
12/13/21	Payroll and 1099 Forms- Are You Reporting Correctly?
12/15/21	TaxSpeaker Federal Tax Update

WATER'S EDGE EVENT CENTER

4687 Millenium Drive, Belcamp, MD 21017 • (410) 297-9467

ROOM RATE: \$91

6/22/21	Topic - TBD MEMBERS ONLY
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HOTEL: HOLIDAY INN BELCAMP

1329 Policy Drive, Belcamp, MD 21017 • (410) 272-2929

2021 MSATP ANNUAL CONVENTION

JOIN US IN OCEAN CITY FOR MSATP'S LARGEST EVENT OF THE YEAR!

WHERE:
**PRINCESS ROYALE,
OCEAN CITY, MD**

WHEN:
JUNE 1-4, 2021

During this 4-day immersive event, you'll hear key strategies from industry experts to scale your business, better serve your clients, and build an in-demand, service-oriented brand. Enjoy networking with peers, potential clients, and strategic partners at the waterfront Princess Royale Resort featuring a lush sundeck, saunas, pools, a spa, and more.

FEATURED SESSIONS

CREATING A CULTURE OF MEASUREMENT AND METRICS



BY : JOHN KENNEDY

Join international speaker, strategist and author John Kennedy as he presents this insightful and dynamic topic that is key to any successful business—measurement.

John will draw from his 25 years of strategic planning and culture creation for companies, associations, and industries that

have adopted this simple motto—**You Can't Expect What You Can't Inspect!**

John will walk you through the six elements of your "Entrepreneurial Operating System" or EOS and help you set up your very own culture of measurement and metrics.

TAXSPEAKER SECURITY

BY : BOB JENNINGS, CPA, EA & RYAN JENNINGS



The most recent few years have seen an explosive growth in attacks on the data of businesses and the national concern and emphasis on preventing security breaches and

mitigating the effects of actual systems penetrations. We have seen guidance from the IRS in IRS Pub. 4557; expansion of IRS security requirements for electronic filing in IRS Pub. 1345; the release of an IRS data security guide in IRS Pub. 5293; new requirements for written internet security systems from the FTC and IRS and numerous warnings from the FBI, IRS and other government agencies.

Our totally updated 2021 Security course addresses every IRS, FTC, FBI and other government security issues by providing you with clear recommendations, checklists, guidelines and examples. Taught by TaxSpeaker's CPA President and his renowned IT expert, it is possibly the most useful class of 2021.

TAXSPEAKER PREPARATIONS, COMPILATIONS & REVIEWS



BY : BOB JENNINGS, CPA, EA

Updated through and including SSARS 25, this course and manual is written and taught by actual practitioners. With dozens of example report letters, engagement letters, client letters and unofficial checklists, this course has been described by attendees as the most useful accounting course they have ever attended. The instructors begin

with a rapid review of the latest SSARS and alerts and then discuss the requirements for prepared financial statements, including disclaimers and engagement letter example. The course then moves into in-depth review of the requirements for compilations, again with engagement letters and example report letters. The instructors also discuss real-life implementation of tax basis reporting under the SPRF requirements. The course concludes with practical real-life review reporting requirements, engagement letters and report letters.

ONENOTE - YOUR OWN PERSONAL INTERNET



BY : ROB SMITH

Microsoft OneNote is the most under-utilized piece of software everyone owns and few know how to use. If you aren't using OneNote or using it just to take notes - this course is for you. Learn how to turn OneNote into your own personal internet library with the ability to capture information and then

retrieve it anywhere at any time. If you know how to take pictures, cut-copy-paste and take screen clippings then you already have the basic functions of OneNote. Once you learn how to organize yourself, you will soon be organizing your firm and your client's information as well.

RESERVE YOUR SEAT ONLINE!

FOR AN ALL-INCLUSIVE GETAWAY...

Each Attendee	\$1,099
Two Attendees (Share Sleeping Room)	\$1,799
Attendee & Spouse	\$1,269

PRICING INCLUDES: 3 nights lodging in luxury suites, 15 hours of CPE, Annual Meeting and Banquet, all meals, Hospitality Suite, and seminar manuals.

FOR THOSE SIMPLY ATTENDING...

Each Attendee	\$599
Attendee & Spouse	\$719
Banquet	\$49

PRICING INCLUDES: 15 hours of CPE, Annual Meeting, 3 buffet breakfasts, 2 buffet lunches, Hospitality Suite, and seminar manuals. If you would like to also attend the Banquet, there is an additional \$49 charge.

Can't attend in-person, but interested in the CPE?

Visit msatp.org/seminars to register for these topics as live webinars.

VISIT CONVENTION.MSATP.ORG TO GET REGISTERED!

2021 BUSINESS BUILDERS CONNECTION CONFERENCE

FORMERLY KNOWN AS THE SOLO & SMALL FIRM PRINCIPAL'S CONFERENCE

Beach Retreat

The Business Builders Connection Conference is a safe space for professionals to share their ideas and collaborate with colleagues. Plus, enjoy the added bonus of an all-inclusive weekend at Bethany Beach Ocean Suites by Marriott! Bethany Beach is a small seaside town with a quaint, village-like feel. Enjoy great tax-free shopping, amazing restaurants, breathtaking sunrises, a day at the spa, wineries, and priceless networking opportunities!

MARK YOUR CALENDARS!

WHERE: BETHANY BEACH OCEAN
SUITES BY MARRIOTT

WHEN: OCTOBER 29-31, 2021

INCLUDES*:

2 night lodging, 13 hours of CPE, two breakfast, 2 dinners and 2 lunches, hospitality suite, manuals, networking.

**Pricing to be determined.*

KEYNOTE SPEAKER: MATTHEW POLLARD

Sunday, October 31, 2021 • 9:00 am–1:00 pm

RAPID GROWTH THE LAZY WAY

Feel like you're on an endless hamster wheel, just trying to keep your business going? You provide an amazing service, but despite all your efforts and good intentions, your day-to-day is a constant struggle to find interested people, set your practice apart, and make the sale – all while competing against established industry players and dealing with customers who seem to care about only one thing... PRICE. In this game-changing session, you'll walk away with a complete understanding of where you've been going wrong, and you will know the three instantly-implementable strategies to turn it all around.

BUILD YOUR STORY PLAYBOOK

What if you could quadruple appointments, shorten sales cycles, and skyrocket profits, all through the application of one powerful technique? Shift away from the uncomfortable bulldog tactics of the past, to a new, relaxed, and scientifically proven methodology that consistently multiplies results, guaranteed.

Visit msatp.org for more details.

PART 1: REGISTRATION INFORMATION

Name _____ Company Name _____
 CPA License # _____ CFP License # _____
 EA License # _____ PTIN # _____
 Address _____
 City, State, Zip _____
 Phone _____ Email _____

I do not wish to accept information on events and legislative updates to the email provided.

To register multiple attendees, please complete a form for each attendee and submit all forms at one time to receive the group discount.

PART 2: SEMINAR REGISTRATION INFORMATION:

DATE(S)	SEMINAR	LOCATION	PRICE
DISCOUNT A: Sign up, on this form, for 2 or more Full Seminar Topics per attendee at one time and receive \$10.00 per day discount. *** Not valid on June 22 or October 19 member only seminars.			
DISCOUNT B: Sign up 3 or more attendees for the same seminar topic & receive \$10.00 off per registrant. (All registration forms & payment must be submitted at the same time) ***Not valid on June 22 or October 19 member only seminars.			
DISCOUNT C: Sign up, on this form, for a morning and afternoon session on the same day and get \$10.00 off per day ***Not valid on Webinars.			
All webinars subject to a 6% sales tax.		6% Sales Tax (<i>Webinars Only</i>)	
		TOTAL	

PART 3: PAYMENT INFORMATION

CHECK: Payable to MSATP CREDIT: Visa, MasterCard, American Express, Discover

NAME ON CARD _____
 CARD NUMBER _____
 EXPIRATION _____ SECURITY CODE _____ BILLING ZIP _____

FINAL TOTAL \$ _____

Seminar Fees	TWO DAY SEMINAR		ONE DAY SEMINAR		MINI* (4 HR)		3 HOUR MINI		EXPRESS* (2 HR)	
	Member	Non-Member	Member	Non-Member	Member	Non-Member	Member	Non-Member	Member	Non-Member
Standard Seminar Pricing	\$480	\$560	\$280	\$340	\$160	\$180	\$135	\$150	\$100	\$110
Late Registration Pricing**	\$505	\$585	\$305	\$365	\$185	\$205	\$160	\$175	\$125	\$135

*When applicable, Mini and Express Seminar pricing also reflects Webinar pricing. **Registration received fourteen days prior to event.

REFUND POLICY: No refunds can be given if written cancellation is received less than 14 days in advance of the seminar and is subject to a \$25.00 service charge. No refund will be given to any Express seminar. All refunds must be approved by the Executive Director.

TRANSFER POLICY: Any transfer by an attendee is subject to a \$25.00 transfer charge as long as the attendee is transferring to another seminar of the same value. This includes transferring from a free ethics seminar.

SEMINAR POLICY: Any individual who registers for a seminar will be responsible for the seminar fee even if the individual does not attend.

COMPLAINT POLICY: For more information regarding administrative policies such as complaints and refunds, please contact Executive Director at (800) 922-9672 or info@msatp.org.

PROGRAM CANCELLATION POLICY: In the event of unforeseen circumstances beyond the Society's control, we will make every effort to contact attendees via email, social media, website and phone.

RETURNED CHECK: Any returned check is subject to a \$25.00 service charge.

PAYMENT POLICY: Payment is due at the time of registration. Any individual who submits a registration form without payment will not be registered for the seminar until payment is received. Registrations for those paying by check will not be processed until the check is received in the Society Office.

WALK-IN POLICY: Any individual who registers on the day of the seminar, will be subject to a \$50.00 service charge.

EMAIL POLICY: Emails obtained by MSATP are not provided or sold to third parties for marketing but are used to enhance your professional knowledge.

SEMINAR MEAL POLICY: A pre-determined option for vegetarian, gluten free and kosher meals are available upon request at least 72 hours prior to an event. Any further dietary restrictions cannot be accommodated.

WEBINAR TRANSFER POLICY: Any transfer by an attendee from a live seminar to a webinar OR a webinar to a live seminar is subject to a \$25.00 transfer charge; transfer must occur at least 14 days in advance of the event.

MSATP reserves the right to publish photographs taken at various events for any purpose including but not limited to: website, publications, catalogs or advertising.

MSATP BUSINESS BUILDERS thinktank

SCALE YOUR PRACTICE WITH A MONTHLY SUPPORT & COACHING GROUP

We know how lonely owning a practice can be. Staying on top of regulations, managing client communications, working long hours, trying to figure out the best advisors and resources...it can all feel extremely challenging and overwhelming. And although networking sessions and seminars are great opportunities to meet new people, it's not always easy to have deep and meaningful conversations in such a fast-paced atmosphere.

That's where MSATP's exclusive members-only program, the Business Builders ThinkTank, comes in. The ThinkTank is a practice owner peer group designed to create a safe and open space where business owners in the accounting and tax profession can connect with each other to discuss and work through challenges while focusing on scalability and development.

The ThinkTank is a collaborative environment; all competitiveness is left at the door. Whether you need a tax question answered or a venting session, you're welcome to join the Business Builders ThinkTank.



For a list of groups to join, visit msatp.org/seminars, or call (800) 922-9672.

NEW ONLINE COMMUNITY FORUM



Have you heard the exciting news? MSATP has created a forum for our members over on our website! It's easy to access — simply:

1. Log in to your MSATP account.
2. From the main menu on the right-hand side, click "Community Forum."

On the forum, you can introduce yourself, post your tax questions (and respond to questions other professionals have), and network with other MSATP members!

THANK YOU FOR BEING AN MSATP MEMBER! WE ARE GRATEFUL FOR YOUR CONTINUED SUPPORT.



To say 2020 was a challenging year is a bit of an understatement. The virtual world brought many changes from what we offer at our live events, including support of the MSA Scholarship Foundation.

From the candy sales to the 50/50 raffles, the money generated at our live events plays a huge role in the number of scholarships available each year. As you can imagine, 2020 hit the Foundation hard. *If you would like to donate to the MSA Scholarship Foundation, you can do so one of several ways:*

- Donation with annual membership dues payment
- Online at donation.msascholarships.org
- Sending a check, made payable to MSA Scholarship Foundation, to 10630 Little Patuxent Parkway, Suite 146, Columbia, MD 21044

In 2020-21, the MSA Scholarship Foundation awarded over 20 scholarships totaling \$31,000.

We would like to recognize five students who have been selected to receive special recognition awards for the 2020-2021 academic year:

- Ekaterina Missry | **Sidney Weinberg Award**
- Roberto Sanchez | **Melvin Menes Award**
- Dante Steele | **Norris "Dave" Crockett Award**
- Molly Rill | **Donald R. Hull Award**
- Jisue Gonzales | **George Spriggs Jr. Award**

As always, we thank you for your continued support and look forward to seeing you in person this year at our upcoming seminars!

2021-2022 MSATP CORPORATE PARTNERS



Jonathan Pocius | 240.699.0060 | www.payrollservicesllc.com

Payroll, HR, Timekeeping, Benefits and More.



Jerry Lotz | 410.960.8269 | www.costseges.com

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The best value for your insurance dollar! Contact us for all of your commercial, healthcare & employee benefits, and personal home & auto insurance needs! For property/casualty insurance needs, call Heather Goldberg (703-961-8886), and for employee benefit needs, call Marc Paulina (703-961-8886).



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APPROVED LICENSING AUTHORITIES*:

The Maryland Society of Accounting & Tax Professionals, Inc. is a professional organization registered/approved by all of the following as a CPE/CE provider:

Accreditation Council for Accountancy & Taxation	Maryland Board of Public Accountancy
Certified Financial Planner Board of Standards, Inc.	National Association of State Boards of Accountancy
Delaware State Board of Accountancy	New Jersey State Board of Accountancy
District of Columbia Board of Accountancy	Pennsylvania State Board of Accountancy
Internal Revenue Service	Virginia Board of Accountancy
Maryland Board of Individual Tax Preparers	West Virginia Board of Accountancy

** Please contact the MSATP Office for information regarding which authorizing organizations have approved these seminars for CPE credits.*



We have entered into an agreement with the Return Preparers Office, Internal Revenue Service, to meet the requirements of 31 Code of Federal Regulations, Section 10.9(a-c), covering maintenance of attendance records, retention of program outlines, qualifications of instructors and length of class hours. This agreement does not constitute an endorsement by the Office of Professional Responsibility as to the quality of the program or its contribution to the professional competence of the enrolled individual. Sponsor Number: MFA75



For all taxation and other applicable subjects, the Maryland Society of Accounting & Tax Professionals courses have been accepted by CFP Board. Please note, CFP credit applies only to our self-sponsored seminars at the full CPE credit value; it applies to self-study products at half the CPE credit value. Please call (800) 231-1860 for more information. CFP®, CERTIFIED FINANCIAL PLANNER®, and the CFP® logo are certification marks owned by the Certified Financial Planner Board of Standards, Inc. These marks are awarded to individuals who successfully complete CFP® Board's initial and ongoing certification.



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