



MARYLAND SOCIETY OF  
ACCOUNTING & TAX PROFESSIONALS

# EDUCATION GUIDE

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2022-2023

WHAT'S  
INSIDE?

UPDATED EDUCATION LISTING  
MEMBERS ONLY WEBINARS  
2022 ANNUAL CONVENTION

10630 LITTLE PATUXENT PKWY #146, COLUMBIA, MD 21044

PHONE (800) 922-9672 | FAX (443) 881-4146 | [MSATP.ORG](http://MSATP.ORG)

## NOTE FROM THE EDUCATION CHAIR



Living through a global pandemic has changed every aspect of our lives. Not only have we had to implement new health and safety measures, but living in the digital age has pushed us to question a lot of information coming across our feeds.

Now more than ever before, continuing education from a trusted resource is imperative. The Maryland Society of Accounting & Tax Professionals is proud to be that resource for over 7,000 individuals.

This industry is one that is constantly flooded with changes and new guidance. We know you need quick responses so you can be there for your clients, and we promise to provide you with the facts as accurately as we can.

With that, we want to say thank you — we are so grateful for your continued support! We look forward to seeing you at our events this year!

If you have questions about the upcoming seminar season or need any assistance, you may reach us directly at [info@msatp.org](mailto:info@msatp.org) or by calling (800) 922-9672. Thank you again for allowing us to serve you, and we look forward to seeing your success in 2022!

With Appreciation,  
Robert Medbery, CPA  
Education Chair, 2021-22

### 4 WAYS TO SIGN UP FOR SEMINARS



By visiting:  
**[msatp.org/seminars](https://msatp.org/seminars)**



By Phone:  
**(800) 922-9672**



By Fax:  
**(443) 881-4146**

Or Mail Completed form to:  
**10630 Little Patuxent Pkwy #146, Columbia, MD 21044**



## SPECIAL EVENTS

### WINE & WHINE



**April 21, 2022 from 5-7PM on Zoom Webinar**

You're invited to a virtual wine tasting and post-tax season wrap-up session! It's all the fun of wine tasting from the comfort of your own home. Plus, don't miss the opportunity to network and meet other professionals as you would at a happy hour. We'll be tasting wine from Crow Vineyard & Winery. Must be 21 and older.

### EMPLOYEE TO ENTREPRENEUR



**July 19, 2022 from 5-7PM on Zoom Webinar**

At some point, many accounting and 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...

## MEMBERS RECEIVE ACCESS TO THESE EXCLUSIVE WEBINARS

MEMBER  
DISCOUNT!

**Cryptocurrency (4 CPE)**

June 28, 2022 | 1–5:00 pm

Zoom Webinar MEMBER PRICE: \$80

**Gear Up Estates & Trusts (8 CPE)**

October 25, 2022 | 8 am–4:15 pm

Zoom Webinar MEMBER PRICE: \$200

# 2022-2023 SEMINAR SCHEDULE

	DATE	SEMINAR/WEBINAR	LOCATION	TIME
MAY	5/23/22	<b>Uncovering Your Full Potential (2)</b>	<b>The Grand Hotel, Ocean City</b>	<b>3 pm – 5 pm</b>
	5/23/22	Uncovering Your Full Potential (2)	Group Internet Based, Webinar	3 pm – 5 pm
	5/24/22	<b>TaxSpeaker Inside-Outside Basis (2)</b>	<b>The Grand Hotel, Ocean City</b>	<b>8 am – 10 am</b>
	5/24/22	TaxSpeaker Inside-Outside Basis (2)	Group Internet Based, Webinar	8 am – 10 am
	5/24/22	<b>TaxSpeaker Medicare (1)</b>	<b>The Grand Hotel, Ocean City</b>	<b>10:30 am – 11:30 am</b>
	5/24/22	TaxSpeaker Medicare (1)	Group Internet Based, Webinar	10:30 am – 11:30 am
	5/24/22	<b>TaxSpeaker Business Pension Plans (3)</b>	<b>The Grand Hotel, Ocean City</b>	<b>1 pm – 4 pm</b>
	5/24/22	TaxSpeaker Business Pension Plans (3)	Group Internet Based, Webinar	1 pm – 4 pm
	5/26/22	<b>TaxSpeaker Best of Tax Planning &amp; Retirement Ideas (8)</b>	<b>The Grand Hotel, Ocean City</b>	<b>8 am – 4:15 pm</b>
	5/26/22	TaxSpeaker Best of Tax Planning & Retirement Ideas (8)	Group Internet Based, Webinar	8 am – 4:15 pm
	5/27/22	<b>Correcting 1099's for a Variety of Forms (2)</b>	<b>The Grand Hotel, Ocean City</b>	<b>8 am – 10 am</b>
	5/27/22	Correcting 1099's for a Variety of Forms (2)	Group Internet Based, Webinar	8 am – 10 am
JUNE	6/14/22	1031 Exchange (2)	Group Internet Based, Webinar	1 pm – 3 pm
	6/16/22	<b>Enrolled Agent Ethics (2)</b>	<b>Clarion Inn FSK, Frederick</b>	<b>10 am – 12 pm</b>
	6/16/22	Enrolled Agent Ethics (2)	Group Internet Based, Webinar	10 am – 12 pm
	6/16/22	<b>Maryland CPA Ethics (4)</b>	<b>Clarion Inn FSK, Frederick</b>	<b>1 pm – 5 pm</b>
	6/16/22	Maryland CPA Ethics (4)	Group Internet Based, Webinar	1 pm – 5 pm
	6/21/22	Farming (4)	Group Internet Based, Webinar	1 pm – 5 pm
	6/22/22	<b>Matthew Pollard Topic</b>	<b>Doubletree Hotel, Columbia</b>	<b>8 am – 4:15 pm</b>
	6/22/22	Matthew Pollard Topic	Group Internet Based, Webinar	8 am – 4:15 pm
SEP	6/28/22	Cryptocurrency (4)-Member Only	Group Internet Based, Webinar	1 pm – 5 pm
	9/20-21/22	<b>TaxSpeaker Business Tax In Depth (16)</b>	<b>Clarion Inn FSK, Frederick</b>	<b>8 am – 4:15 pm</b>
	9/20-21/22	TaxSpeaker Business Tax In Depth (16)	Group Internet Based, Webinar	8 am – 4:15 pm
OCTOBER	9/28/22	Fraud in Accounting (4)	Group Internet Based, Webinar	1 pm – 5 pm
	10/19/22	<b>TaxSpeaker Business Tax Update (8)</b>	<b>Ocean City Fontainebleau Hotel</b>	<b>8 am – 4:15 pm</b>
	10/19/22	TaxSpeaker Business Tax Update (8)	Group Internet Based Webinar	8 am – 4:15 pm
	10/20/22	<b>TaxSpeaker 1041's for Trusts and Estates (8)</b>	<b>Ocean City Fontainebleau Hotel</b>	<b>8 am – 4:15 pm</b>
	10/20/22	TaxSpeaker 1041's for Trusts and Estates (8)	Group Internet Based Webinar	8 am – 4:15 pm
	10/25/22	Gear Up Estates and Trusts (8)	Group Internet Based Webinar	8 am – 4:15 pm
	10/27/22	Maryland CPA Ethics (4)- REBROADCAST	Group Internet Based Webinar	8 am – 12 pm
	10/27/22	Enrolled Agent Ethics (2)- REBROADCAST	Group Internet Based Webinar	1 pm – 3 pm

# 2022-2023 SEMINAR SCHEDULE

NOVEMBER

DATE	SEMINAR/WEBINAR	LOCATION	TIME
<b>11/1/22</b>	<b>Non-Profit Accounting (2)</b>	<b>Turf Valley Resort, Ellicott City</b>	<b>10 am – 12 pm</b>
11/1/22	Non-Profit Accounting (2)	Group Internet Based, Webinar	10 am – 12 pm
<b>11/1/22</b>	<b>Maryland Income Tax Update (4) *</b>	<b>Turf Valley Resort, Ellicott City</b>	<b>1 pm – 5 pm</b>
11/1/22	Maryland Income Tax Update (4) *	Group Internet Based, Webinar	1 pm – 5 pm
<b>11/4-6/22</b>	<b>Business Builders Connect Conf (13)</b>	<b>Marriott Ocean Suites, Bethany Beach, DE</b>	<b>3 days of Education</b>
<b>11/15-16/22</b>	<b>TaxSpeaker 1040 In Depth (16)</b>	<b>Martin's West, Baltimore</b>	<b>8 am – 4:15 pm</b>
11/15-16/22	TaxSpeaker 1040 In Depth (16)	Group Internet Based, Webinar	8 am – 4:15 pm
<b>11/30-12/1/22</b>	<b>TaxSpeaker 1040 In Depth (16)</b>	<b>Ocean City Fontainebleau Hotel, Ocean City</b>	<b>8 am – 4:15 pm</b>
11/30-12/1/22	TaxSpeaker 1040 In Depth (16)	Group Internet Based, Webinar	8 am – 4:15 pm

DECEMBER

<b>12/2/22</b>	<b>Maryland CPA Ethics (4)</b>	<b>Ocean City Fontainebleau Hotel, Ocean City</b>	<b>8 am – 12 pm</b>
12/2/22	Maryland CPA Ethics (4)	Group Internet Based, Webinar	8 am – 12 pm
<b>12/2/22</b>	<b>Maryland Income Tax Update (2) *</b>	<b>Ocean City Fontainebleau Hotel, Ocean City</b>	<b>1 pm – 3 pm</b>
12/2/22	Maryland Income Tax Update (2) *	Group Internet Based, Webinar	1 pm – 3 pm
<b>12/2/22</b>	<b>Enrolled Agent Ethics (2)</b>	<b>Ocean City Fontainebleau Hotel, Ocean City</b>	<b>3:30 pm – 5:30 pm</b>
12/2/22	Enrolled Agent Ethics (2)	Group Internet Based, Webinar	3:30 pm – 5:30 pm
<b>12/6-7/22</b>	<b>Gear Up 1040 In Depth (16)</b>	<b>Doubletree Hotel, Annapolis</b>	<b>8 am – 4:15 pm</b>
12/6-7/22	Gear Up 1040 In Depth (16)	Group Internet Based, Webinar	8 am – 4:15 pm
<b>12/12/22</b>	<b>Maryland CPA Ethics (4)</b>	<b>Turf Valley, Ellicott City</b>	<b>8 am – 12 pm</b>
12/12/22	Maryland CPA Ethics (4)	Group Internet Based, Webinar	8 am – 12 pm
<b>12/12/22</b>	<b>Maryland Income Tax Update (2) *</b>	<b>Turf Valley, Ellicott City</b>	<b>1 pm – 3 pm</b>
12/12/22	Maryland Income Tax Update (2) *	Group Internet Based, Webinar	1 pm – 3 pm
<b>12/12/22</b>	<b>Enrolled Agent Ethics (2)</b>	<b>Turf Valley, Ellicott City</b>	<b>3:30 pm – 5:30 pm</b>
12/12/22	Enrolled Agent Ethics (2)	Group Internet Based, Webinar	3:30 pm – 5:30 pm

JAN

<b>1/4-5/23</b>	<b>TaxSpeaker 1040 In Depth (16)</b>	<b>Clarion Inn FSK, Frederick</b>	<b>8 am – 4:15 pm</b>
1/4-5/23	TaxSpeaker 1040 In Depth (16)	Group Internet Based, Webinar	8 am – 4:15 pm
<b>1/10/23</b>	<b>TaxSpeaker Federal Tax Update (8)</b>	<b>Turf Valley, Ellicott City</b>	<b>8 am – 4:15 pm</b>
1/10/23	TaxSpeaker Federal Tax Update (8)	Group Internet Based, Webinar	8 am – 4:15 pm

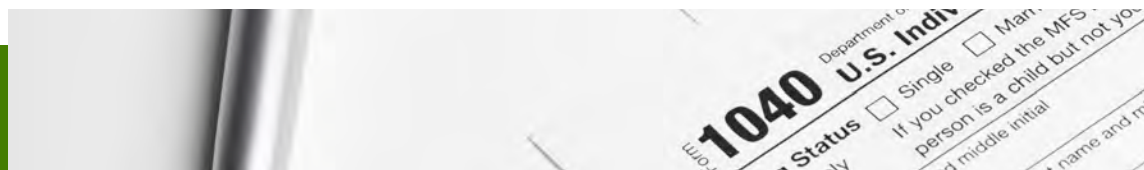
## KEY

Parentheses ( ) = CPE Hours \*Per Maryland Individual Tax Preparer Board

Items in **BOLD** are offered as In-person seminars

# 2022-2023 SEMINAR LISTING

## TAXES



### SEMINAR TITLE

### FACILITATORS

### DELIVERY

TaxSpeaker Inside-Outside Basis: S Corps and Partnerships | Bob Jennings, CPA, EA- TaxSpeaker | Group Live, Group Internet Based

### DETAILS

**Program Level:** Update **Hours:** 2 (Recommended) **Prerequisites:** Knowledge of Tax Law Regulations

**Food Included:** Continental Breakfast, Beverages **Member:** \$100 **Non-Member:** \$110



TaxSpeaker Medicare

Bob Jennings, CPA, EA- TaxSpeaker

Group Live, Group Internet Based

### DETAILS

**Program Level:** Update **Hours:** 1 (Recommended) **Prerequisites:** Knowledge of Tax Law Regulations

**Food Included:** Beverages **Member:** \$65 **Non-Member:** \$70



TaxSpeaker Business Pension Plans

Bob Jennings, CPA, EA- TaxSpeaker

Group Live, Group Internet Based

### DETAILS

**Program Level:** Update **Hours:** 3 (Recommended) **Prerequisites:** Knowledge of Tax Law Regulations

**Food Included:** Beverages **Member:** \$135 **Non-Member:** \$150



TaxSpeaker Best of Tax Planning and Retirement Ideas for Individuals

Bill Leonard, CPA- TaxSpeaker

Group Live, Group Internet Based

### DETAILS

**Program Level:** Update **Hours:** 8 (Recommended) **Prerequisites:** Knowledge of Tax Law Regulations

**Food Included:** Continental Breakfast, Two Breaks, Lunch **Member:** \$280 **Non-Member:** \$340



Correcting 1099's for a Variety of Forms

Betty Stehman, CPA

Group Live, Group Internet Based

### DETAILS

**Program Level:** Update **Hours:** 2 (Recommended) **Prerequisites:** Knowledge of Tax Law Regulations

**Food Included:** Continental Breakfast, Beverages **Member:** \$100 **Non-Member:** \$110



## ICON KEY



Certified Public Accountant



Certified Financial Planner



Enrolled Agent



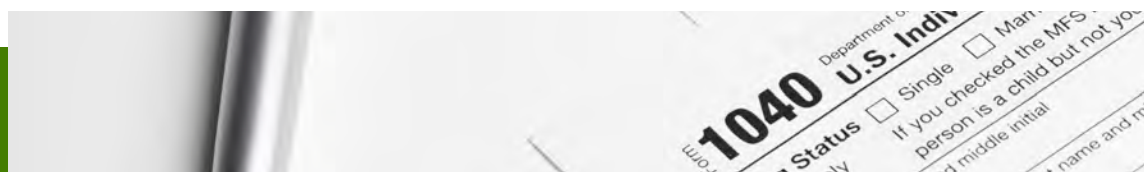
Annual Filing Season Program



MD Registered Tax Preparers

# 2022-2023 SEMINAR LISTING

## TAXES



### SEMINAR TITLE

### FACILITATORS

### DELIVERY

1031 Exchanges

Les Marti, EA

Group Internet Based

### DETAILS

**Program Level:** Update **Hours:** 2 (Recommended) **Prerequisites:** Knowledge of Tax Law Regulations

**Food Included:** N/A **Member:** \$100 **Non-Member:** \$110



Farming

Les Marti, EA

Group Internet Based

### DETAILS

**Program Level:** Update **Hours:** 4 (Recommended) **Prerequisites:** Knowledge of Tax Law Regulations

**Food Included:** N/A **Members:** \$160 **Members:** \$180



Cryptocurrency: Overview of Technology, Accounting & Tax

Justin Hughes, CPA

Group Internet Based

### DETAILS

**Program Level:** Update **Hours:** 4 (Recommended) **Prerequisites:** Knowledge of Tax Law Regulations

**Food Included:** N/A **Members Only:** \$80



Federal Tax Update- Corporations & Partnerships

Bill Leonard, CPA- TaxSpeaker

Group Live, Group Internet Based

### DETAILS

**Program Level:** Update **Hours:** 8 (Recommended) **Prerequisites:** Knowledge of Tax Law Regulations

**Food Included:** Continental Breakfast, Two Breaks, Lunch **Members:** \$280 **Non-Members:** \$340



TaxSpeaker 1041 for Trusts & Estates

Bill Leonard, CPA- TaxSpeaker

Group Live, Group Internet Based

### DETAILS

**Program Level:** Update **Hours:** 8 (Recommended) **Prerequisites:** Knowledge of Estates and Trusts

**Food Included:** Continental Breakfast, Two Breaks, Lunch **Member:** \$280 **Member:** \$340



## ICON KEY



Certified  
Public  
Accountant



Certified  
Financial  
Planner



Enrolled  
Agent



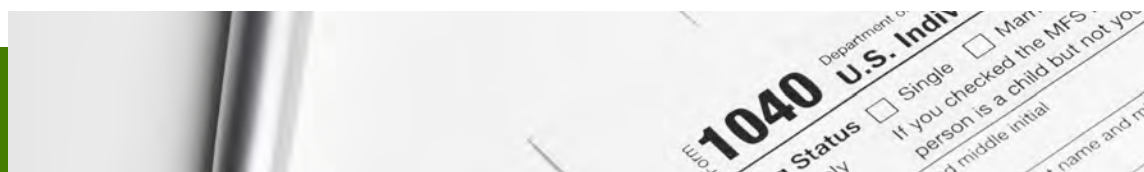
Annual  
Filing Season  
Program



MD  
Registered  
Tax Preparers

# 2022-2023 SEMINAR LISTING

## TAXES



### SEMINAR TITLE

### FACILITATORS

### DELIVERY

TaxSpeaker Business Tax In Depth

Bob Jennings, CPA, EA; Terry Bakker, CPA, EA;- TaxSpeaker

Group Live, Group Internet Based

### DETAILS

**Program Level:** Update **Hours:** 16 (Recommended) **Prerequisites:** Knowledge of Tax Law Regulations

**Food Included:** Continental Breakfast, Two Breaks, Lunch

**Member:** \$480

**Non-Member:** \$560



Gear Up Estates & Trusts

Charles Burdoin, CPA- Gear Up

Group Internet Based

### DETAILS

**Program Level:** Update **Hours:** 8 (Recommended) **Prerequisites:** Knowledge of Estates and Trusts

**Food Included:** N/A **Member:** \$200 **Non-Member:** \$340



Maryland Income Tax Update

Krista Sermon and Andrew Maschas -  
Revenue Administration Division

Group Live, Group Internet Based

### DETAILS

**Program Level:** Update **Hours:** 2 (Recommended) **Prerequisites:** Knowledge of MD Tax Law and Regulations

**Food Included:** Beverages **Members:** \$100 **Members:** \$110



Maryland Income Tax Update

Krista Sermon and Andrew Maschas, Revenue  
Administration Division; Representatives from SDAT

Group Live, Group Internet Based

### DETAILS

**Program Level:** Update **Hours:** 4 (Recommended) **Prerequisites:** Knowledge of MD Tax Law and Regulations

**Food Included:** PM Break **Member:** \$160 **Non-Member:** \$180



Gear Up 1040 Tax In Depth

Dave Krebs, CPA; Laurie Stillwell, CPA- Gear Up

Group Live, Group Internet Based

### DETAILS

**Program Level:** Update **Hours:** 16 (Recommended) **Prerequisites:** Knowledge of Tax Law Regulations

**Food Included:** Continental Breakfast, Two Breaks, Lunch

**Member:** \$480

**Non-Member:** \$560



## ICON KEY



Certified  
Public  
Accountant



Certified  
Financial  
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Agent



Annual  
Filing Season  
Program

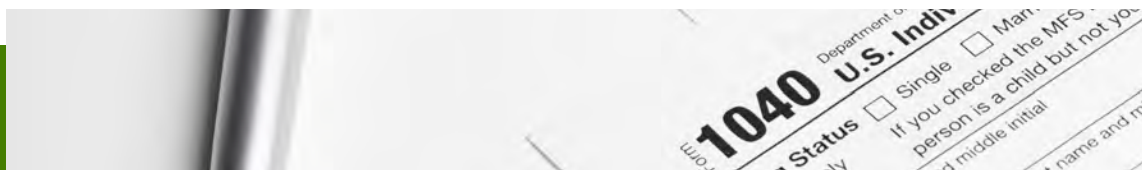


MD  
Registered  
Tax Preparers



# 2022-2023 SEMINAR LISTING

## TAXES



### SEMINAR TITLE

### FACILITATORS

### DELIVERY

TaxSpeaker 1040 Tax In Depth

Bob Jennings, CPA, EA; Bill Leonard, CPA; Terry Bakker, CPA, EA; Gregg Goodsell, EA; Mark Mirsky, CPA- TaxSpeaker

Group Live, Group Internet Based

### DETAILS

**Program Level:** Update **Hours:** 16 (Recommended) **Prerequisites:** Knowledge of Tax Law Regulations

**Food Included:** Continental Breakfast, Two Breaks, Lunch **Member:** \$480 **Non-Member:** \$560



TaxSpeaker Federal Tax Update  
- Business & Individual

Bill Leonard, CPA- TaxSpeaker

Group Live, Group Internet Based

### DETAILS

**Program Level:** Update **Hours:** 8 (Recommended) **Prerequisites:** Knowledge of Tax Law Regulations

**Food Included:** Continental Breakfast, Two Breaks, Lunch **Member:** \$280 **Non-Member:** \$340



## ACCOUNTING



Fraud in Accounting

George Luff, CPA

Group Internet Based

### DETAILS

**Program Level:** Update **Hours:** 4 (Recommended) **Prerequisites:** Knowledge of Accounting Standards

**Food Included:** N/A **Members:** \$160 **Non-Members:** \$180



Non-Profit Accounting

George Luff, CPA

Group Live, Group Internet Based

### DETAILS

**Program Level:** Update **Hours:** 2 (Recommended) **Prerequisites:** Knowledge of Accounting Standards

**Food Included:** Beverages **Members:** \$100 **Non-Members:** \$110



### ICON KEY



Certified  
Public  
Accountant



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Financial  
Planner



Enrolled  
Agent



Annual  
Filing Season  
Program



MD  
Registered  
Tax Preparers

# 2022-2023 SEMINAR LISTING

## PERSONAL DEVELOPMENT



### SEMINAR TITLE

### FACILITATORS

### DELIVERY

Uncovering Your Full Potential

John Kennedy

Group Live, Group Internet Based

### DETAILS

**Program Level:** Update **Hours:** 2 (Recommended) **Prerequisites:** Knowledge of General Business Skills

**Food Included:** Beverages **Members:** \$100 **Non-Members:** \$110

CPA

Matthew Pollard Topic

Matthew Pollard

Group Live, Group Internet Based

### DETAILS

**Program Level:** Update **Hours:** 8 (Recommended) **Prerequisites:** Knowledge of General Business Skills

**Food Included:** Continental Breakfast, Two Breaks, Lunch **Members:** \$320 **Non-Members:** \$320

CPA

## REGULATORY ETHICS



Maryland CPA Ethics

George Luff, CPA; Barbara J. Smith, CPA

Group Live, Group Internet Based

### DETAILS

**Program Level:** Update **Hours:** 4 (Recommended) **Prerequisites:** Knowledge of Regulatory Ethics

**Food Included:** Continental Breakfast or PM Break, Beverages **Members:** \$160 **Non-Members:** \$180

CPA

Enrolled Agent Ethics

D. Barry Iacono, EA

Group Live, Group Internet Based

### DETAILS

**Program Level:** Update **Hours:** 2 (Recommended) **Prerequisites:** Knowledge of Regulatory Ethics

**Food Included:** Beverages **Members:** \$100 **Non-Members:** \$110

EA AFS MD

### ICON KEY



Certified  
Public  
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Planner



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Agent



Annual  
Filing Season  
Program



MD  
Registered  
Tax Preparers

# 2022 LOCATION AND SLEEPING ROOM RATES



## CLARION INN FSK, FREDERICK

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

**ROOM RATE**  
**\$116**

6/16/22	Enrolled Agent Ethics
6/16/22	Maryland CPA Ethics
9/20-21/22	TaxSpeaker Business Tax In-Depth
1/4-5/23	TaxSpeaker 1040 Tax In-Depth



## DOUBLETREE ANNAPOLIS

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

**ROOM RATE**  
**\$106**

12/6-7/22 | Gear Up 1040 In Depth



## MARTIN'S WEST

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

11/15-16/22 | TaxSpeaker 1040 Tax In-Depth

## HOTEL: HAMPTON INN & SUITES

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

**ROOM RATE**  
**\$99**



# 2022 LOCATION AND SLEEPING ROOM RATES



## OCEAN CITY FONTAINEBLEAU HOTEL

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

**ROOM RATE**  
\$129 (Oct)  
\$85 (Dec)

10/19/22	TaxSpeaker Business Tax Update
10/20/22	TaxSpeaker Form 1041 Trust & Estates
11/30-12/1/22	TaxSpeaker 1040 Tax In-Depth
12/2/22	Maryland CPA Ethics
12/2/22	Maryland Tax Law Update
12/2/22	Enrolled Agent Ethics



## THE GRAND HOTEL

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

**ROOM RATE**  
\$138

5/23/22	Critical Thinking and Problem Solving
5/24/22	TaxSpeaker Inside-Outside Basis: S Corps & Partnerships
5/24/22	TaxSpeaker Medicare
5/24/22	TaxSpeaker Business Pension Plans
5/26/22	TaxSpeaker Best of Tax Planning & Retirement Ideas for Individuals
5/27/22	Correcting Payroll Forms



## TURF VALLEY RESORT

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

**ROOM RATE**  
Contact facility  
for best pricing

11/1/22	Non-Profit Accounting
11/1/22	Maryland Tax Law Update
12/12/22	Maryland CPA Ethics
12/12/22	Maryland Tax Law Update
12/12/22	Enrolled Agent Ethics
1/10/23	TaxSpeaker Federal Tax Update



# MSATP'S ANNUAL CONVENTION & BANQUET

**WHEN** MAY 23-27, 2022

**WHERE** THE GRAND HOTEL, OCEAN CITY, MD

Celebrate the end of tax season by relaxing by the beach!

During this 5-day event, you'll hear key strategies from industry experts to help scale your business, better serve your clients, and build an in-demand, service-oriented brand. Enjoy networking with peers, and strategic partners at The Grand Hotel right on the Ocean City Boardwalk!

Reserve Your Seat at **[convention.msatp.org](https://convention.msatp.org)**

## FOR AN INCLUSIVE GETAWAY

**EACH ATTENDEE**  
**\$1,249**

**TWO ATTENDEES (SHARE ROOM)**  
**\$1,998**

**ATTENDEE & GUEST**  
**\$1,399**

*Pricing includes 4 nights lodging, 18 hours of CPE, Annual Meeting and Banquet, 3 breakfast buffets, lunch on Tuesday, Hospitality Suite, and seminar manuals.*

## FOR THOSE SIMPLY ATTENDING

**EACH ATTENDEE**  
**\$749**

**ATTENDEE & GUEST**  
**\$999**

**BANQUET**  
**\$55**

*Pricing includes 18 hours of CPE, Annual Meeting and Banquet, 3 buffet breakfasts, lunch on Tuesday, Hospitality Suite, and seminar manuals.*

*Can't attend in person, but interested in the CPE? Visit [msatp.org/seminars](https://msatp.org/seminars) to register for these topics as live webinars.*



# 2022 BUSINESS BUILDERS CONNECTION CONFERENCE

**SAVE THE DATE!**

**WHEN: NOVEMBER 4-6, 2022**

**WHERE: BETHANY BEACH OCEAN SUITES BY MARRIOTT**

Enjoy 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!

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



# SCHOLARSHIP FOUNDATION



The Maryland Society of Accountants Scholarship Foundation, Inc. is pleased to announce the scholarship recipients for the 2021-2022 academic year:

<b>Alba Contreras</b>	<i>University of Maryland College Park</i>
<b>Liangliang DiFilippo</b>	<i>Salisbury University</i>
<b>John Ikegwu</b>	<i>University of Maryland College Park</i>
<b>Noriluz Jimenez</b>	<i>University of Maryland College Park</i>
<b>Molly Rill</b>	<i>University of Maryland Global Campus</i>
<b>Cameron Shaw</b>	<i>University of Maryland College Park</i>
<b>Minh Tran</b>	<i>Towson University</i>
<b>Mehir Uddin</b>	<i>Towson University</i>

Scholarships to these outstanding applicants will total \$14,000 for this academic year alone. Additionally, four of these students have been selected to receive special recognition awards at an upcoming seminar. Those students and their corresponding awards are listed below:

<b>Liangliang DiFilippo</b>	<i>Sidney Weinberg Award</i>
<b>Molly Rill</b>	<i>Melvin Menes Award</i>
<b>Minh Tran</b>	<i>Norris "Dave" Crockett Award</i>
<b>Alba Contreras</b>	<i>George Spriggs Jr. Award</i>

Fundraising efforts include candy sales, 50/50 raffles, annual wreath and holiday decorative pieces promotion, AmazonSmile participation, and general donations. For more information on the MSA Scholarship Foundation or to donate, please visit our newly designed website at [www.msascholarships.org](http://www.msascholarships.org). Because of your donations and continued support, we really can make a difference in the future of many students. We thank you and look forward to seeing you at an upcoming seminar!

## 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](http://msatp.org/seminars), or call (800) 922-9672.

## 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.





## 2022-2023 REGISTRATION FORM

Maryland Society of Accounting & Tax Professionals, Inc.  
10630 Little Patuxent Parkway, Ste. 146, Columbia, Maryland 21044  
PHONE: (800) 922-9672 • (410) 876-5998 FAX: (443) 881-4146  
WEBSITE: msatp.org EMAIL: info@msatp.org

### 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 28 or October 25 member discounted 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 28 or October 25 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 webinar rebroadcasts subject to a 6% sales tax.		6% Sales Tax (Webinar Rebroadcast Only)	
TOTAL			

### PART 3: PAYMENT INFORMATION

<input type="checkbox"/> CHECK: Payable to MSATP	<input type="checkbox"/> CREDIT: Visa, MasterCard, American Express, Discover
NAME ON CARD _____	
CARD NUMBER _____	FINAL TOTAL \$ _____
EXPIRATION _____ SECURITY CODE _____ BILLING ZIP _____	

Seminar Fees	TWO DAY SEMINAR		ONE DAY SEMINAR		4 HOUR MINI		3 HOUR MINI		2 HOUR EXPRESS		1 HOUR EXPRESS	
	Member	Non-Member	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	\$65	\$70
Late Registration Pricing**	\$505	\$585	\$305	\$365	\$185	\$205	\$160	\$175	\$125	\$135	\$90	\$95

\*When applicable, Mini and Express Seminar pricing also reflects Webinar pricing.

\*\*Registration received 14 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](mailto: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.**

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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).



**JONATHAN POCIUS | 240.699.0060 | [WWW.PAYROLLSERVICESLLC.COM](http://WWW.PAYROLLSERVICESLLC.COM)**

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We help tax professionals and their clients, who own/lease residential rental, multi-family and commercial property, by providing the calculations that accelerate depreciation and save income taxes.



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American Advisors Group (AAG) is dedicated to helping older Americans find new ways to fund a better retirement through the responsible use of home equity. As the nation's leader in reverse mortgage lending, AAG offers a suite of home equity solutions — including Home Equity Conversion Mortgages and traditional and proprietary mortgages — designed to give seniors a better financial outcome in retirement.

# 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.*



APPROVED CONTINUING  
EDUCATION PROVIDER

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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