

Income Tax School 2024

THE place to get the latest info on new tax laws, Vermont income taxes and much more. The UVM Extension Income Tax School delivers the latest Federal and Vermont tax information, and can provide up to 15 total hours of CE credits for EAs/AFSPS and up to 16 hours for CPAs (if the “Bonus Ethics Session” is taken). No CE Credit is offered for Vermont Income Tax updates (except to CPAs).

This year we will focus on the complications of new tax laws. We have a diverse group of volunteer speakers, allowing us to provide another great year of education.

Topics

- New Legislation
- Limited Liability Company Issues
- Rental Activities — Including Repair vs. Capitalizing Expenditures, loss limits
- Business Issues
- Retirement Issues
- Rulings and Cases
- IRS Issues
- Vermont Department of Taxes
- International Tax Issues; FBAR, FIRPTA and 1040-NR
- Individual Tax Issues
- Agriculture Issues
- Related Party Complications
- Clean vehicle and energy Credits
- Trust and Estate Issues
- Ethics

Sponsored by UVM Extension
in cooperation with:

Internal Revenue Service
Vermont Department of Taxes
Vermont Tax Practitioners Association



APPROVED
CONTINUING EDUCATION
PROVIDER

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THE UNIVERSITY OF VERMONT
EXTENSION

INCOME TAX SCHOOL 2024



November 6–7
Delta Hotels by Marriott
1117 Williston Road
South Burlington, VT

(Zoom option available)

November 12–13
**Killington Grand
Resort Hotel**
228 East Mountain Road
Killington, VT

(no remote option)

INCOME TAX SCHOOL 2024

Instructors

Kyle Anderson, EA	Stephanie Machia, EA
Seth Anderson, EA	Lela McCaffrey, CPA, CFP
Jennifer Bouchard	Joe McCarthy, IRS, CPA
Molly Bucci, Esq.	Brian Murphy, Atty.
Jason Cadwell, CPA/PFS, CFP	Rick Renzelman, EA
Sandy Enman, CPA	John Scheer, CPA
Jeff Fothergill, CPA	Claude Schwesig, CPA, B. Comm
Joan Holloway, CPA, CMA	Ashlie Smith
Mark Langan, Atty.	Arlon Warner, EA
Alicia Marcy, EA	Vermont Department of Taxes

Facilitator

Lauren Jarvi, EA

Coordinators

Seth Anderson, Tax School Coordinator
Peggy Manahan, Registrar/Administrative Assistant
Lisa Flinn, Administrative Assistant

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Bonus Session (2 hours)

Ethical Tax Situations & Practices

Stephanie Machia, EA; Arlon Warner, EA; Joan Holloway, CPA, CMA

This practitioner panel presents ethical situations, possible rule infractions, and how to navigate them. Offered at both locations on Day 1, 3:55 – 5:35 p.m. **Additional fee of \$75.**

Dates & Locations

November 6–7 (Zoom option available)
WEDNESDAY/THURSDAY

Delta Hotels by Marriott, South Burlington, Vt.
In-person limited to 165 participants
go.uvm.edu/delta-hotel-btv

November 12–13 (No remote option)
TUESDAY/WEDNESDAY

Killington Grand Hotel, Killington, Vt.
To book your room online visit:
go.uvm.edu/killingtonbooking

Schedule (all times EST)

7:30 – 8:15 am	Check-in & refreshments
7:45 – 8:15 am	Zoom sign-in
8:15 am – 3:45 pm	Program
3:55 – 5:35 pm	Bonus Ethics Session (<i>day 1, optional</i>)

Registration

Fee includes instruction, lunches, refreshments and Tax Workbook.

Early:	\$430, Aug. 6 – Sept. 20, 2024
General:	\$485, Sept. 21 – Oct. 24, 2024
Late:	\$595, on or after Oct. 25, 2024
Ethics Session:	add \$75

Cancellation Policy & Fees

Except medical, family or military emergency

More than 15 days prior to date of event: \$75

Less than 15 days prior to date of event: \$150

Cancellation deadlines are Oct. 22 (So. Burlington), Oct. 28 (Killington)

Cancellation fees include in-person and online participants

Contact

Program & Facilities: Peggy Manahan, 802-656-7620

Credits & Certificates: Lisa Flinn, 802-656-7607

REGISTRATION

Register for the 2024 Income Tax School and Bonus Ethics Session online or by mail.

Option 1: Online

Register online for South Burlington, Killington, or remote:

<https://go.uvm.edu/2024taxschool>

Visa and MasterCard accepted. We are unable to accept cash payments with online registration.

Option 2: By Mail

Return this registration form (one per participant) with check payable to “University of Vermont” to:

UVM Extension Tax School
Attn: Peggy Manahan
278 South Main St., Suite 2
St. Albans, VT 05478-1866

Name	_____
Organization	_____
Address	_____
City/State/Zip	_____
Phone	_____
Email	_____
PTIN	_____
Dietary Restrictions	_____

South Burlington Killington Online

Registration Fee

Refer to fees, discounts and deadlines listed to the left.

To request a disability-related accommodation to participate in this program, please call 802-656-7753 or email access@uvm.edu by Wednesday, October 16, 2024 so we may assist you.