

Income Tax School 2023

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 14 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
- Clean Vehicle Credits
- Like-Kind Exchanges
- Business Issues
- Retirement Issues: Including changes to inherited IRAs and Secure Act 2.0
- Rulings and Cases
- IRS Issues
- Vermont Department of Taxes
- Foreign Income Tax Issues
- Individual Issues
- Agriculture Issues
- Form 4797 Review
- Employee vs Independent Contractor Review
- Trust and Estate Issues
- Ethics



THE UNIVERSITY OF VERMONT
EXTENSION

INCOME TAX SCHOOL 2023



Sponsored by UVM Extension
in cooperation with:

Internal Revenue Service
Vermont Department of Taxes
Vermont Tax Practitioners Association



APPROVED
CONTINUING EDUCATION
PROVIDER

November 7–8
South Burlington, VT
(Zoom option available)

November 14–15
Killington, VT
(no remote option)

go.uvm.edu/taxschool

INCOME TAX SCHOOL 2023

Instructors

Seth Anderson, EA
Patti Bisson, EA
Jennifer Bouchard, CPA
Molly Bucci, Esq.
Jason Cadwell, CPA/PFS, CFP
Sandy Enman, CPA
Jeff Fothergill, CPA
Joan Holloway, CPA, CGMA
Mark Langan, Atty.
Alicia Marcy, EA
Stephanie Machia, EA

Lela McCaffrey, CPA, CFP
Joe McCarthy, IRS, CPA
Brian Murphy, Atty.
Rick Renzelman, EA
John Scheer, CPA
Claude Schwesig, CPA, B. Comm
Ashlie Smith
Arlon Warner, EA
Vermont Department of Taxes

Facilitators

Kirk Clarke, JD
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, CGMA

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 \$50.

Dates & Locations

November 7–8 (Zoom option available)

Delta Hotels by Marriott
1117 Williston Road, South Burlington, Vt.
In-person limited to 165 participants
go.uvm.edu/delta-hotel-btv

November 14–15 (No remote option)

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

Schedule (all times EST)

7:45 – 8:15 a.m.	Online sign-in / tech help
7:30 – 8:15 a.m.	Refreshments
8:15 a.m. – 3:45 p.m.	Program
3:55 – 5:35 p.m.	Day 1 Bonus Ethics Session (optional, \$50 additional fee)

Registration

Fee includes instruction, lunches, refreshments and Tax Workbook.

Early:	\$395, July 15 – Sept. 14, 2023
General:	\$445, Sept. 15 – Oct. 26, 2023
Late:	\$555, on or after Oct. 27, 2023
Ethics Session:	add \$50

Cancellation Policy & Fees

Except medical, family or military emergency

More than 15 days prior to date of event \$100

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

Cancellation deadlines are Nov. 6 (So. Burlington), Nov. 13 (Killington)

Cancellation fees include in-person and online participants

Contact

Peggy Manahan: 1-800-639-2130 or 1-802-524-6501

REGISTRATION

There are two ways to register for the 2023 Income Tax School and Bonus Ethics Session.

Option 1: Online

Register online for South Burlington, Killington, or remote:

go.uvm.edu/2023-tax-school-reg

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 _____

Registration Fee

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

Total Enclosed \$ _____

To request a disability-related accommodation to participate in this program please contact access@uvm.edu or call 802-656-7753 by October 16, 2023 so we may assist you.