

Income Tax School 2022

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
- Partnership Tax Issues
- Business Issues
- Rulings and Cases
- IRS Issues
- Vermont Department of Taxes
- Foreign Income Tax Issues
- Individual Issues
- Investment and Retirement
- Agriculture Issues
- 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



THE UNIVERSITY OF VERMONT
EXTENSION

INCOME TAX SCHOOL 2022



November 1–2
South Burlington, VT
(Zoom option available)

November 8–9
Killington, VT
(no remote option)

go.uvm.edu/taxschool

INCOME TAX SCHOOL 2022

Instructors

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

Facilitators

Nick Bullock, EA	Lauren Jarvi, EA, CFP
Kirk Clarke, JD	Mike Moloney, EA

Coordinators

Seth Anderson, Tax School Coordinator
Peggy Manahan, Registrar/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. \$40 additional fee.

Dates & Locations

November 1–2 (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 8–9 (No remote option)

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

Schedule

7:45 – 8:15 a.m.	Online participant sign-in
7:30 – 8:15 a.m.	Refreshments
8:15 a.m. – 3:45 p.m.	Program
3:45 – 5:35 p.m.	Day 1 Bonus Ethics Session (optional, \$40 additional fee)

Registration

Fee includes instruction, lunches, refreshments and Tax Workbook.

Early:	\$375, until Sept. 16, 2022
General:	\$420, Sept. 17 – Oct. 28, 2022
Late:	\$525, on or after Oct. 29, 2022
Ethics Session:	\$40

Cancellation Policy & Fees

Except medical, family or military emergency

More than 15 days prior:	\$50
Less than 15 days prior:	\$100
Site Switching Fee:	\$50

Contact

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

REGISTRATION

There are two ways to register for the 2022 Income Tax School and Bonus Ethics Session.

Option 1: Online

go.uvm.edu/2022taxschool

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, 2022 so we may assist you.