Accounting & Financial Women's Alliance/Seattle University Fall Tax Seminar 2017

Accounting & Financial Women's Alliance
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Seattle Chapter

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ALBERS SCHOOL OF BUSINESS AND ECONOMICS

When — Friday, December 8, 2017. Sign-in and breakfast begin at 8:00am; seminars begin at 8:30am
Where — Seattle University, Pigott Building (Albers School of Business & Economics), Room 103
Cost — $150 (price includes 8 hours of CPE, parking, light breakfast, lunch and snack.

International Tax

8:30am — 10:10am

Moses Man, CPA and Mary Hawkins, CPA

Moses and Mary will discuss common tax issues facing U.S. persons with income or assets in foreign countries and non-resident aliens with U.S. sourced income or assets

Special Needs Trust Update

10:20am— 12:00pm

Barbara J. Byram, JD

Topics will include planning with special needs trusts, changes in federal and state law regarding special needs trusts, interaction of special needs trust , Medicaid, and the ABLE act, changes to Veterans Administration regulations regarding special needs trusts, and Vulnerable Adult Act

Lunch

12:00pm — 1:00pm

MarketPlace Fairness Act

1:00pm — 2:40pm

Washington State Department of Revenue

Beginning January 1, 2018, certain marketplace facilitators, remote sellers, and referrers have new obligations related to the collection of sales or use taxes or the providing of notifications. Depending on its activities, one business can be a marketplace facilitator, a remote seller, and a referrer or any combination of these activities. What does this all mean?

Stock Compensation

2:50pm — 4:30pm

Valerie Moseley, CPA

Stock Compensation: We'll work through basis of ESPP shares and I'll share my no-think spreadsheet with you. We'll spend some time on 83(b) elections on restricted stock, non-qualifying options, and incentive stock options. I'll share with you a recent example of a client who had ESPP, Stock Awards, and ISO's at the same time when his company was bought out by Dell.

Valerie Moseley, CPA –Principal of Moseley & Associates, LLC

Valerie has worked at several Seattle public accounting firms, helping individuals and small businesses with their tax preparation and planning needs. She has developed a reputation for her friendly demeanor and clear explanations. She enjoys teaching clients, helping them understand their particular situation, allowing them to make the best tax and business choices.

She also volunteers with the Small Business Administration, introducing entrepreneurs to the fun world of business tax obligations in SCORE's monthly Small Business Workshop, and coaching entrepreneurs in SBA's Emerging Leader's Program. Valerie has a background in the performing arts; she is the former Treasurer of the Board of Ear to the Ground, a Seattle-based physical theatre company, and is the former Treasurer of the Board of Washington Lawyers for the Arts.

Barbara J. Byram, JD

Barbara J. Byram is an Attorney with the law firm of Aiken, St. Louis & Siljeg, P.S. Ms. Byram's practice focuses on elder law, estate planning, benefit advocacy, guardianship, probate, and drafting and administration of special needs trusts.

Barbara graduated from Seattle University School of Law, Juris Doctorate, Eastern Washington University, Bachelor/Education, Masters/ Education, with honors. A member of the Washington State Bar Association, the Seattle King County Bar Association, and the National Academy of Elder Law Attorneys.

Moses Man, CPA -Principal of M Squared Tax, PLLC

Moses has over 12 years of experience guiding businesses and individuals through complex international tax laws. He started his career at a Big 4 accounting firm, where he provided international tax consulting and tax compliance services to Fortune 500 multinationals. After departing from the Big 4, Moses worked with a nationally recognized local accounting firm to serve mid-market multinational clients, from EB-5 investors to start-up companies. Moses holds a B.A from Seattle University and a Masters of Professional Accounting (Taxation) from University of Washington.

Mary Hawkins, CPA, MST, CGMA

Mary is the owner of Mary H Hawkins CPA PS in Kirkland and enjoys working with clients who have cross-border tax issues. She has a BS in Accounting from Virginia Tech and a MS in Tax from Golden Gate University.

Washington State Department of Revenue

Kristine M. Rompa is the Legislative Communication Coordinator for the Department of Revenue and is a graduate of Seattle University's Alber School of Business and Economics. She has a B.A. in Economics and has worked for the agency for over 19 years.

Adam Wolfson is a Tax Policy Specialist with the Department of Revenue, where he has worked for the past eight years. He received a B.S. in Accounting from Rutgers University and a J.D. from Fordham Law School. During the 2017 Legislative Session, Adam worked as the Department of Revenue's primary analyst on Engrossed House Bill 2163 ("the Marketplace Fairness Act").

~ Registration Deadline: December 1, 2017 ~

To register, please email Jani Medeiros at medeirj@seattleu.edu and include your name, company, email, phone number and if you need parking. Driving directions will be emailed to you.

Seminar Questions? Call:
Mary Hawkins 425-947-1234 mary@mhawkinscpa.com
Eleanor Siverts-Akerman 425-455-1620 eleanor@hutchcpa.com

Please send a check (Payable to *Seattle University—Accounting Dept*) for $150 to:

Seattle University
Attn: Jani Medeiros
901 - 12th Avenue
P.O. Box 222000
Seattle, WA 98122

***think green-We encourage carpooling. Speaker material will be emailed 1 week prior to the seminar or when available**

Registration info also available on the Calendar section of the AFWA website: www.seattleafwa.org and www.bellevueafwa.org