Accounting & Financial Women's Alliance
Fall Tax Seminar 2020

Accounting & Financial Women's Alliance
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Seattle Chapter

When — Friday, December 11,2020. Seminars begin at 8:30am.
Where — Zoom meeting.
Cost — $95 for 8 hours of CPE; discounted price of $80 for AFWA members

Building Wealth/Blocking Wealth: How Our Tax & Financial Institutions Support Inequity in Personal Finance

8:30am — 10:10am

Michelle A Fait

We all know ways to build wealth: Save money, buy a house, own a business, invest for the long-term. But does everyone have equal access to the opportunities to do this? From bank accounts, business loans, car loans and mortgages, to 401k rules, inheritance laws, and benefits for homeowners and investors, our tax and financial systems are specific and intentional in creating and perpetuating obstacles to financial well-being for all Americans.

Bankruptcy—Tax Primer

10:20am— 12:00pm

Ken Weil

Partial-pay remedies for tax debt are found in the Tax Code and the Bankruptcy Code. This webinar will provide basic information on how the Bankruptcy Code can be used to deal with tax debt. Issues addresses will include tax liens, discharging unsecured debt, and how to deal with returns that are non-filed, late-filed, or prepared by the IRS (substitutes-for-returns).

Lunch

12:00pm — 1:00pm

Washington Estate Tax Returns

1:00pm — 2:40pm

Susan Shore & Ginger Bailey

Presented by estate tax examiners from the Department of Revenue, the basics of the Washington Estate Tax Return will be discussed as well as common mistakes found upon examination.

Basics of Form 1041 and Elections to Consider

2:50pm — 4:30pm

Anna Au

The presentation will provide guidance on the preparation of Form 1041 and counseling clients on the issues involving estates, including elections that can be made on the return.

Michelle A Fait, MBA, CFP®, EA, CDFA™-Satori Financial LLC

Michelle, Founder of Satori Financial LLC, is a Certified Financial Planning practitioner (CFP®), with expertise in investments and tax, focusing on the planning needs of single professional women. She holds an MBA in Finance from Yale University and a bachelor's degree in Economics from U.C. Berkeley. She is also an Enrolled Agent, a Certified Divorce Financial Analyst, and believer that money doesn't buy happiness, even if you know where to shop.

Kenneth Weil, J.D, LL.M-Principal

Ken is a native of Alabama, graduate of the University of Alabama School of Law. He has been in solo practice since 1995– Law Office of Kenneth C. Weil. He served a member of the Tax Advisory Committee to the National Bankruptcy Review Commission, writes the annual update on new developments in tax and bankruptcy.

Anna Au, CPA, TEP—Partner, VWC PS

As a former partner at several CPA firms, and VP at a closely held, family-owned company with 400+ employees, Anna is a true problem solver who specializes in working with businesses and families on sensitive family estates, trusts, and transition issues.

Susan Shore –Excise Tax Examiner with Dept of Revenue

Susan works the with the Estate Tax section of the Audit division of the Department of Revenue. She has worked estate tax for 12 years. Susan has worked for the Department of Revenue for 30 years. She started with the Taxpayer Account Administration division working the combined excise tax return for seven years. She transferred to the Audit division to work on public works contract auditing for 11 years.

Ginger Bailey—Excise Tax Examiner with Dept of Revenue

Ginger Bailey has been an Excise Tax Examiner with the Estate Tax team since March 2017. Prior to joining the Audit division, she worked in the Taxpayer Account Administration division for 17 years working primarily with Excise, Sales, and Use Taxes.

~ Registration Deadline: December 5, 2020~

To register, please email Mary Hawkins at mary@mhawkinscpa.com and include your name, company, email, and phone number.

Please send a check (Payable to *AFWA/ Bellevue Chapter*) to:

Mary H Hawkins
733 7th Ave, Ste 114
Kirkland, WA 98033

Seminar Questions? Call:
Mary Hawkins 425-947-1234 mary@mhawkinscpa.com
Renna Pala 832-563-3148 reena@reenacpa.com

Registration info also available on the AFWA websites: www.seattleafwa.org and www.bellevueafwa.org