President’s Address

Randy Adams, EA

I have had the pleasure of working with some excellent people in my years in mid-level management. Similarly, I believe I have some of the finest people to represent you on the Iowa NATP Board of Directors. In this article I would like to highlight a short bio from the people who spend a lot of time and energy putting together education programs, conducting business with our National Leadership, communicating Federal and State changes on websites and newsletters and in dealing with issues that many of you run into as you conduct business in your practice. These are your representatives and their contact info:

**Western Iowa**

**Bob Darrah**

darrahandcompany@qwestoffice.net

Bob is an accountant and owner of Darrah and Company in Council Bluffs. He has a Bachelor of Science degree and three years of law school. He has 40 years of experience with individual, business, estate and trust income taxes.

**Larry McAlexander, EA**
ljcnc@aol.com

Larry is a tax preparer at Southwest Iowa Farm Business Association since 1984. Larry organizes and analyzes farm records, offers transition planning and estate planning services. He also prepares individual and various entity income tax returns, including trusts. Larry lives in Treynor, Iowa. Larry is serving as Treasurer of the Iowa NATP Chapter.

**Northern Iowa**

**Kristy Mather, CPA**
bottomln@ncn.net

Kristy was the first female graduate in Ag-Business from Iowa State University in 1975. She worked as a Bank Examiner for the Federal Reserve right out of college. In the early 90’s, she worked for a few years in an attorney’s office in Laurens doing tax returns, while taking additional schooling in accounting to become a CPA. Since 1994, she has been self-employed and currently works out of her home doing mostly individual returns with a few corporations and partnerships, along with monthly bookkeeping services. She is proud to be a member of the Iowa NATP Chapter, currently serving as Secretary on the Board of Directors. Kristy has been married for 39 years to Bill Mather (Sales Manager at John Deere in Laurens). They are parents of Dean (USDA Elevator Auditor) married to Kels and living in Altoona, and Marie Burrows (Nurse Practitioner for Iowa State University) married to Chris and living in Ames.
Kathy Flannery-Salgren
flannerytax@gmail.com
Kathy lives in Fort Dodge and co-owns Flannery Tax & Bookkeeping with her husband, Wayne. Her father opened the business in 1975, and she later joined him in 2000. Wayne joined the business in 2012. They added two additional support staff this past year and in addition to tax preparation, they offer bookkeeping and payroll services. In their tax business they mostly prepare individual returns but have added several corporate and business customers. Their specialties include daycares and income properties. Both Kathy and Wayne have accounting degrees and are studying to take the EA exam prior to the 2016 tax season. Kathy has lived most of her life in Fort Dodge. Wayne and Kathy have five children and four grandchildren. Their interests outside of business are traveling, kayaking and spending time with family.

Central Iowa
Sharon McClellan, EA, ATA, ATP
mcclellansharon@q.com
Sharon is from West Des Moines. Prior to retirement she and her husband, Ray, had a 4,000 client office providing tax preparation and representation for individuals and businesses. Sharon has authored and taught tax courses for over 30 years. She has been a certified speaker for NATP and taught other businesses including the IRS.

Don Kramer, EA
donkramer@cda-cpa.com
Don is a partner at Cline, DeVries & Allen, LLP with offices in Ames and Clive. He received a Bachelor of Science degree in Accounting from Austin Peay State University in Clarksville, Tennessee. Don has 40 years of income tax experience with individuals, businesses, estates and trusts. Don is serving as Vice-President of the Iowa NATP Chapter.

Eastern Iowa
Deb Wiese, EA
debw@debwiesetax.com
Deb has had her business, known as Deb Wiese’s Bookkeeping & Tax Service, since 1981. She has offices in Clinton and DeWitt. Deb’s business provides a variety of services including personal and small business tax preparation, electronic filing, payroll services, Quickbooks services, and personal and small business bookkeeping. The business is open year round. Deb is fortunate to have a wonderful staff with both seasonal and full-time employees. There is an office kitty (yes, that’s right, as in cat) on staff who is in charge of office hospitality. Deb has been a member of NATP for many years and on the Board of Directors since 2012. On a personal note, she has been married to her husband, Duane, for nearly 37 years. They live in Camanche. Duane and Deb have two children and two grandchildren and have also hosted nine foreign exchange students. In addition to spending time with family, Deb enjoys reading, scrapbooking and gardening. She also volunteers for Downtown Clinton Alliance as the treasurer, Downtown Improvements Committee chairperson and with Camanche’s Christmas Sharing Tree Project.

Southern Iowa
Laura Merschman, AFSP
laura@merschtax.com
Laura Merschman has 5 years of tax experience and over 15 years of accounting experience. Laura earned a Bachelor of Science degree in Accounting from Colorado Technical University with honors and has a background in tax and small firm accounting including payroll. Laura is currently serving her first three year term on the Iowa NATP Board of Directors.
NATP National Conference

Don Kramer, EA

Have you ever attended the NATP National Conference? I attended my first conference six years ago in Austin, Texas and have been to the conference each year since. I enjoyed both the education and social aspects of each conference, as well as traveling to other parts of the country. There are numerous CPE topics to choose from, taught by some of the best instructors in our field. There are evening activities, including a Chapter showcase with complimentary hors d’oeuvres, cash bar, raffles, and an auction with proceeds donated to a local charity. The conference ends with a banquet on Thursday evening. My wife has traveled with me each year and has enjoyed museums, tours, coffee shops, and of course shopping. This year, the conference is in New Orleans from July 20th through July 23rd. The New Orleans chapter has organized a steamboat cruise on the Mississippi River, complete with a buffet dinner. The networking opportunities are also wonderful at the conference. We look forward to an evening meal with members from our Iowa Chapter. There are also vendors at each conference, and I have found it quite interesting to visit with many of them to learn more about products and services related to our industry. If you have not attended a national conference, I recommend giving it consideration. The 2016 conference will be August 9th through August 12th in Indianapolis.

NATP Leadership Summit 2015

Laura Merschman, AFSP

It is in the news nearly every day, Tax Reform. With all of the talk about tax reform, it is important to consider what the future will look like for NATP as an organization, as well as its chapters and members. NATP held a leadership summit on May 6 to discuss exactly that. Kathy Stanek had done research and the board felt that it was important to discuss where the profession is going and how NATP remains a viable entity. At the onset, NATP’s mission has always been to connect tax professionals with unmatched education, information and research. To remain viable NATP as well as each of us must stay abreast of the changes of the profession. Where will we be in 2020?

Mitchell Fox of Venturebeat.com remarks, “five years from now, this data will be collected, organized, and crunched on your behalf in near real time....” In his article, he also envisions having more immediate access to data. As of now, 70 percent of all taxpayers can use Free File Alliance to file their returns. So if more taxpayers file their own returns, where does that leave us as tax preparers? How do our companies remain viable in this process? How will we diversify? We have to look at the changes that are happening in technology. Five years from now, how many of our clients will be millennials, the tech savvy generation of today. There is a lot to think about and we, as individuals need to be thinking about where we are going in the future, just as NATP as an organization is looking at how it will change.

Much of the discussion on NATP chapters had to do with how to include younger members in board of director or volunteer positions. Millennials are much more
tech savvy than most baby boomers and typically prefer a shorter period for volunteerism. Surveys estimate a 3-4 month volunteer period or give a millennial a defined goal, they will accomplish the goal and then move on to a new project that appeals to them and/or their skill set. It was felt that the chapters needed to have more of these one time or short term volunteer periods to entice younger members to get involved. In addition, that NATP National could assist in the visibility of these roles.

We all have seen articles regarding the IRS trying to go more real time on their website. We have recently seen that there are inherent problems with going real time, in the data breach that occurred on Get a Transcript. I believe, the IRS will continue down this path of more real time information, but may be slowed up a bit to ensure that taxpayer identities are not put at risk again. The speed at which this will happen I feel will largely depend upon Congress and the budget constraints imposed on the IRS. Our due diligence as tax professionals will probably increase in the process. SO... are you prepared?

References:
NATP Summit slides, NATP website 2015.
NATP Summit Brainstorming Summary, NATP website 2015.

Lastly, we have a number of conferences in Iowa this year. Check your calendars for these opportunities:
1) Iowa Annual Conference Sept 23-25 at the Holiday Inn Urbandale IA. Our speakers this year will be NATP members Mary & Dave Mellem from Green Bay WI.
2) One-day Conference in Council Bluffs IA October 29th. The speakers will be IA NATP members certified for our state.
3) One-day Conference in Cedar Rapids IA December 4th. The speakers will be IA NATP members certified for our state.

Thanks for being part of this very active and enjoyable state membership! Please contact me with any questions or concerns.
Randy Adams, Iowa NATP President
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