



**NAEA AFFILIATE PRESIDENTS EXCHANGE (APEX)
Registration Form and Checklist**

Name: _____

Affiliate: _____

Position/Title: _____

Date Submitted: _____

_____ **I will be attending the Affiliate Presidents Exchange Meeting on Thursday, April 29 and Friday, April 30.**

In addition, I will be attending the following activities as indicated:

_____ Government Relations Fly-In, Wednesday, April 28 (pre-registration required)

_____ APEX & NAEA Board of Directors (BOD) dinner, Thursday, April 29 (reservation required)

_____ Installation Reception and Dinner, Friday, April 30 (reservation required)

_____ NAEA Board of Directors Meeting, Saturday, May 1

_____ Capitol Steps performance, Saturday, May 1 (reservation required)

To assist you, here are key deadlines:

- April 2: Hotel Reservation deadline for Comfort Inn Ballston (GR Fly-in hotel)
- April 12: Stipend Application deadline
- April 19: Hotel Reservation for L'Enfant Plaza Hotel (APEX and BOD hotel)

Please fax this form to 202-822-6270 or email to tmartin@naea.org. Please direct any questions or comments to Tori Martin or Sam Matlick at 202-822-6232.



NAEA AFFILIATE PRESIDENTS EXCHANGE

Schedule for April/May 2010 Meetings

Wednesday, April 28, 2010 – *pre-registration required*

8:00 am – 9:00 am Government Relations Fly-In Breakfast/Briefing at Van Scoyoc and Associates
9:00 am – 3:00 pm Meetings with Legislators
4:00 pm – 6:00 pm Reception for GR Fly-In participants at the Democratic National Club

Thursday, April 29, 2010

2:00 pm – 5:30 pm Affiliate Presidents Exchange (APEX) session with Terri Langhans on Marketing
6:30 pm – 9:00 pm BOD & APEX Dinner at Gadsby's Tavern in Old Town Alexandria

Friday, April 30, 2010

7:30 am – 8:00 am Continental Breakfast
8:00 am – 9:45 am APEX Session
9:45 am – 10:00 am Break

10:00 am – 11:45 pm BOD & APEX session with Nadine McPhail, Chief, Case Development &
Licensure Branch, Office of Professional Responsibility on CPE and CPE Sponsorship

12:00 pm – 1:30 pm BOD & APEX Lunch with Dave Williams, IRS, Executive Lead, Return Preparer
Regulations Implementation

1:45 pm – 2:45 pm Presentation by Peter Bullock, Gleim Publications, and discussion of SEE Review and
Prep Programs
2:45 pm - 3:00 pm Break

3:00 pm – 5:00 pm APEX session continued

6:00 pm – 6:30 pm Reception
6:30 pm – 9:00 pm Installation Dinner

Saturday, May 1, 2010

8:30 am – 9:00 pm Continental Breakfast
9:00 am – 2:00 pm NAEA Board of Directors Meeting
7:30 pm – Capitol Steps



The National Association of Enrolled Agents will be conducting the 2010 spring Affiliate Presidents' Exchange (APEX) on April 29 and 30, followed by a meeting of the NAEA Board of Directors on May 1, with all events taking place at the L'Enfant Plaza Hotel in Washington, DC. **All** state affiliate Presidents are encouraged to attend and may designate a key staff member or other volunteer leader (such as an Executive Director or Vice President) to accompany them or attend in their place. While we welcome multiple participants from one state, only one stipend award is possible for a state.

These gatherings are intended to encourage communication and the sharing of ideas among the national leadership, NAEA staff and affiliate leadership, as well as to develop personal relationships among members. At this meeting, state leaders will have the opportunity to hear nationally recognized marketing expert Terri Langhans, learn more about OPR's CPE sponsorship requirements, receive an update on IRS' Return Preparer Regulation and review options for helping SEE candidates prepare to become enrolled agents. In addition, there will be plenty of time for networking, and the chance to recognize the Affiliate Council Challenge winners at the Installation Dinner on Friday evening.

In order to help defray the cost of participation, Quickfinders (Thomson Reuters) is providing funds for travel stipends for state affiliate leaders. Quickfinders has been a long-time supporter of NAEA and enrolled agents, and offers well-known and respected products for the profession. Stipend awards will be determined based on the number of applications received and the amount requested. **Applications must be submitted no later than Monday, April 12th, 2010.**

After attending the meetings but no later than **June 15th**, the awardees must submit the "request for reimbursement form" which will be provided on-site. Please note: requests for reimbursements after this date will not be honored. Receipts for expenses covered by the award (such as airfare or hotel costs) will need to be attached. Checks from NAEA go out on the 15th and 30th of each month, so awardees can anticipate the arrival of checks based on the date it is submitted.

Each attendee is responsible for making his/her own hotel reservation. To reserve a room at the \$169 rate at the L'Enfant Plaza Hotel, please call 800-635-5065 or [visit the website](#) The deadline for the special rate is **April 19**.

Only one stipend will be awarded per state, and NAEA reserves the right to approve or deny any application. Stipend amounts are based on applications received and amount requested, but will likely cover one or two hotel nights. Questions regarding the spring 2010 APEX meeting or the stipend process should be directed to Tori Martin or Sam Matlick at 202-822-6232.

**National Association of Enrolled Agents
Spring 2010 Affiliate Presidents Exchange Meeting**

Stipend Application

*Send form to Tori Martin at tmartin@naea.org or by fax to 202-822-6270 by Monday, April 12, 2010.
Please feel free add additional pages if necessary to expand on and/or clarify any of your answers.*

Participant Name: _____

Affiliate: _____

Amount Requested: _____

Is your attendance at this APEX meeting dependent upon receiving this stipend? _____

Is your state affiliate paying for your attendance at these meetings? _____

Are you spending personal funds to attend? _____

If you receive a stipend, how will you share your experience with directors and/or members in your state?

As of this date, what has your affiliate organization done to meet the "2010 Membership Challenge" put forth by the NAEA Affiliate Council? _____

Please add any other information that might be useful to NAEA in making a stipend award.



April/May 2010 Meetings

Quick Tips

Date:	Tuesday, April 27	NAEA Executive Committee (invite only)
	Wednesday, April 28	Government Relations Fly-In Day (invite only)
	Thursday, April 29	NAEA Board of Directors Orientation (invite only)
	Friday, April 30	NAEA Board of Directors Orientation (invite only)
		Affiliate Presidents Exchange Dinner (invite only)
		NAEA Board of Directors Orientation (invite only)
		State Affiliate Presidents Exchange (invite only)
	Saturday, May 1	NAEA Board of Directors Meeting
Hotel:	L'Enfant Plaza Hotel, 480 L'Enfant Plaza, SW Washington, DC 20024	
Reservations:	Reservations: 800-635-5065 Hotel main: 202-484-1000	
Rate:	\$169 single or double plus tax per night	
Deadline:	Reservation deadline April 19, 2010	
Discount Code:	If calling, cite code NAEA Spring Board Meeting . If registering online, go to: https://gc.synxis.com/rez.aspx?Hotel=16836&Chain=5388&group=NAE427	
Cancellation:	Cancellations are refunded or credited only if notice is received 72 hours prior to arrival date and cancellation number must be obtained by guest	
Hotel Check In:	Check-in 3 pm, Check-out noon	
Transportation:	From Reagan National Airport By Taxi – Approximately \$30 By METRO –Yellow Line toward Georgia Ave/Petworth Station to the L'Enfant Plaza Station. Take the Metro exit that faces the side of the train, not the exit to the front or rear of the train.	
Dress Code:	Business attire	

For further details please contact Margaret Mitchell at 202-822-6232 ext.105 or email mmitchell@naea.org.



**NAEA Event Reservation Form
April 2010 Board of Directors/Affiliate Presidents Exchange Dinner**

Thursday, April 29, 2010; 6:30 pm at
Gadsby's Tavern in Old Town Alexandria (138 N Royal St, Alexandria, VA; 703-548-1288)

Cost: \$55 per dinner

Name: _____

Name of Guests: _____

Total Number of Dinners: _____

Total amount: \$ _____

Date Submitted: _____

Remittance is by:

___ Check payable to NAEA ___ VISA ___ MC ___ AMEX ___ DISCOVER

Credit Card Number: _____ Exp. Date: _____

Signature: \$ _____

All dinners include a Tavern Salad and Sally Lunn bread

Please indicate your choice of entrée below:

___ Prime Rib (served with Yorkshire pudding and horseradish sauce, whipped potatoes, and vegetables du jour)

___ Chicken Fontina (pan sautéed, topped with spinach and Fontina cheese and served with creamy risotto)

___ Herb-Crusted Grilled Salmon (with whipped potatoes and vegetables du jour)

Please indicate your choice of dessert below:

___ Gingerbread with cinnamon icing

___ Topsy English Trifle

___ Rum-laced Banana Bread Pudding

Please fax this form to the attention of Tori Martin at 202-822-6270. Space is limited, so reserve now! If paying by check, please submit your check to Tori or Sam Matlick once you arrive at the hotel or prior to the dinner.



**NAEA Installation Dinner
Friday, April 30, 2010; 6:30 pm**

\$65.00 per Person

Registration Form

Name: _____

Date: _____

Number of guests you will be bringing (*not including yourself*): _____

Names of guests: _____

Remittance is by:

___ **Check payable to NAEA:** *please submit your check to Margaret Mitchell prior to the installation dinner once you arrive at the hotel.*

___ **Credit Card:** ___ **VISA** ___ **MC** ___ **AMEX** ___ **DISCOVER**

Credit Card Number: _____ **Exp. Date:** _____

Signature: _____

Total amount to be charged to your credit card: _____

Please fax this form to the attention of Margaret Mitchell at 202-822-6270.



NAEA Event Reservation Form Capitol Steps

Saturday, May 1, 2010; 7:30 PM
Ronald Reagan Building (1300 Pennsylvania Ave, NW)
Cost: \$33 per ticket

Name: _____

Name of Guests: _____

Total Number of Tickets: _____

Total amount: _____

Remittance is by:

Check payable to NAEA VISA MC AMEX DISCOVER

Credit Card Number: _____ Exp. Date: _____

Signature: _____

Please fax this form to the attention of Margaret Mitchell at 202-822-6270. Space is limited, so reserve now! If paying by check, please submit your check to Margaret Mitchell once you arrive at the hotel or prior to the board meeting.

About the Capitol Steps

The Capitol Steps began as a group of Senate staffers who set out to satirize the very people and places that employed them. In the years that followed, many of the Steps ignored the conventional wisdom ("Don't quit your day job!"), and although not all of the current members of the Steps are former Capitol Hill staffers, taken together the performers have worked in a total of eighteen Congressional offices and represent 62 years of collective House and Senate staff experience.

Since they began, the Capitol Steps have recorded 29 albums, including their latest, *Barackin' Around the Christmas Tree* and *Obama Mia!*. They've been featured on NBC, CBS, ABC, and PBS, and can be heard four times a year on National Public Radio stations nationwide during their *Politics Takes a Holiday* radio specials.