

**From:** Cosea [publications@cosea.org]  
**Sent:** Thursday, April 02, 2015 9:21 AM  
**To:** linda13@lward.biz  
**Subject:** April 2015



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April 2, 2015

Dear Linda,

April 15 is just 14 days away! May your Extensions be few!

### FY 2014 DATA BOOK NOW AVAILABLE

The IRS released the [2014 IRS Data Book](#), a snapshot of agency activities for the fiscal year, including statistics on return filing, collection, enforcement and more.

### PROPERTY TAX EXEMPTION

A property tax exemption is available to qualifying senior citizens and the surviving spouses of seniors who previously qualified. The three basic requirements are; 1) the qualifying senior must be at least 65 years old on January 1 of the year in which he or she qualifies; 2) the qualifying senior must be the owner of record, and must have been the owner of record for at least ten consecutive years prior to January 1; and 3) the qualifying senior must occupy the property as his or her primary residence, and must have done so for at least ten consecutive years prior to January 1.

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[National Association of Enrolled Agents](#)

### MONTHLY MEETING

**APRIL 28, 2015**

Monthly meeting

Program:  
Utilizing Qualified  
Plans for Maximum  
Tax Benefits

For those who qualify, 50 percent of the first \$200,000 of actual value of the applicant's primary residence is exempted. The state will reimburse the county treasurer for the lost revenue.

A person can have only one primary residence at a time. If the senior is registered to vote, the address used for voter registration is considered the senior's primary residence.

Exceptions: 1) the ownership has been transferred to or purchased by a trust, corporate partnership or other legal entity solely for estate planning purposes; 2) the qualifying senior or his or her spouse was or is confined to a health care facility; 3) the prior residence was condemned in an eminent domain proceeding.

Disabled Veterans Exemption: Qualifying veterans are those who have a 100 percent permanent and total disability rating from the U.S. Department of Veterans Affairs as a result of a service-connected disability and who have owned and occupied the property as their primary residence since January 1.

Speaker:  
Eric Jenson, MBA,  
IAR

Meal:  
Chicken Pasta  
Alfredo

Register at  
[CoSEA.org](http://CoSEA.org)

## IRS FREE WEBINAR ON IDENTITY THEFT

**Tuesday, May 12, 2015** the IRS is having a Free Webinar for Tax Professionals on Identity Theft: After Filing Season Information to Assist Your Clients. See [CoSEA](http://CoSEA.org) website for the brochure.

## OTHER INFORMATION

### MEMBER IN NEWS

#### **John Dundon, EA**

served as an expert resource to our local NBC affiliate, Channel 9 News, for the story "IRS Will Forgive Certain Healthcare Tax Errors."

### SPRING SEMINAR

**SAVE THE DATE**  
**Tax Resolution Seminar**  
**June 3 and 4, 2015**

#### **Speakers:**

**Dave Miles, EA**  
**Amy King, EA**  
**Claudia Hill, EA**

## IRS Appeals Officers

### CoSEA PUBLICATIONS

MARCH'S TEASER: Which President started the practice of releasing his tax returns? President Nixon

APRIL'S TEASER: Astrology: What is the first astrological sign in the Zodiac?

Watch for the brochure on the Spring Seminar.

Join us April 28 and share your tax season "war stories"!  
Sincerely,

**Linda Ward**

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<http://cosea.org>



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