

PHYLLIS JO KUBEY, EA CFP® ATA ATP

Tax Preparation & Consultation

255 West 108th Street #8D1

New York, NY 10025-2926

(212)866-8385/Fax: (212)932-2395/E-mail: PKubey@nyc.rr.com



Phyllis Jo Kubey has been preparing tax returns and offering tax planning and consultation since 1986. In 1985 she enrolled in H & R Block's tax preparation course to learn to better prepare her own income tax returns. She fell in love with the work (and they with hers – they hired her out of the class to work for the company) and worked part-time for Block in January of 1986. This was an amazing opportunity with excellent training and exposure to a lot of different types of tax returns and situations. Also, it was in the days before computerized tax preparation programs – working with pencil, adding machine, and actual tax forms – giving Ms. Kubey the increasingly rare (as younger preparers work with computerized tax preparation right away and trusting the usually accurate, but not always, tax preparation software) experience of actually working out the calculations involved in a complex tax return and knowing where all the information flows on both federal and state returns. Ms. Kubey opened her own tax business later that year and has been in business continuously for 30+ years. She continued to work part-time for H & R Block until 1989 when she left to devote more time to her own business.

Ms. Kubey has earned the professional licenses of Certified Financial Planner (CFP®), Accredited Tax Advisor (ATA), Accredited Tax Preparer (ATP), and Enrolled Agent (EA). She is a fellow of the National Tax Practice Institute (NTPI) and a member of the National Association of Enrolled Agents (NAEA), National Association of Tax Professionals (NATP), National Society of Accountants (NSA), Pride Planners, National Society of Tax Professionals (NSTP), NCPE Fellowship, and Financial Planning Association (FPA).

National Tax Practice Institute: <http://www.naea.org/education-events/national-tax-practice-institute/ntpi-fellow>

National Association of Enrolled Agents: <http://www.naea.org/>

National Association of Tax Professionals: <http://www.natptax.com/Pages/default.aspx>

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National Society of Accountants: <http://www.nsacct.org/>
National Society of Tax Professionals: <https://www.nstp.org/>
NCPE Fellowship: <http://ncpefellowship.com/>
Financial Planning Association: <http://www.fpanet.org/>
Accredited Tax Preparer/Accredited Tax Advisor: <http://www.acatcredentials.org>

Ms. Kubey subscribes to numerous comprehensive tax research services and many professional publications to stay current and to have access to the most up-to-date tax information available. She moderated the NYSSEA Tax Questions Google Group, a forum for NYS Enrolled Agents, for several years, and remains an active participant.

To maintain the licenses listed above, Ms. Kubey takes at least 30 continuing education credits (actual credits = 121 for calendar year 2013/180 for calendar year 2014/192 for 2015/241 for 2016/269 for 2017, and 137 for 2018) each year for tax certification and at least 24 credits each year for financial planning certification.

As an enrolled agent/EA Ms. Kubey is admitted to practice before the IRS and most state taxing authorities and enjoys the same practice privileges as CPA's and Attorneys.

EAs are the only tax preparers licensed in all 50 states by the U.S. Treasury Department who not only prepare returns, but can represent taxpayers before all administrative levels of the IRS. They run interference between you and the IRS and state taxing authorities to insure that you get fair treatment.

She specializes in IRS and state tax-related representation – audits, collection, non-filing cases, etc. – and has particular expertise in areas relating to musicians, actors, artists, non-resident alien tax issues, US citizens working abroad, same-sex couples, and clergy.

Ms. Kubey is active with NYSSEA (New York State Society of Enrolled Agents), having served two terms as a Director of the NYSSEA, and now serves as NYSSEA's second vice president. She was featured in the Member Spotlight of the June 2013 issue of National Society of Accountant's magazine, Main Street Practitioner. In June 2014 Ms. Kubey debuted as a panelist on the Tax Talk Today TV series discussing Ethics & Standards for Tax Professionals, along with Karen Hawkins (Director, IRS Office of Professional Responsibility) and Robert McKenzie, Esq. EA. In July 2015 she was invited back and was featured again as a panelist discussing the Affordable Care Act and its impact on tax professionals. Her third appearance took place in September 2017 on International Tax Issues – US Citizens and Residents living and investing Abroad.

On July 26, 2017, Ms. Kubey was honored to represent NAEA testifying before Congress (Senate Finance Committee subcommittee on Taxation and IRS Oversight) giving the tax practitioner's perspective on improving tax administration today. Links to written testimony and archived video are here:

<https://www.finance.senate.gov/hearings/subcommittee-on-taxation-and-irs-oversight-improving-tax-administration-today>

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C-SPAN archive is here: <https://www.c-span.org/person/?115030>

Ms. Kubey serves as Chair of the NAEA PAC steering committee and is active in both federal and state/local advocacy efforts promoting effective tax administration, the enrolled agent credential, and championing taxpayer rights. In August 2015, at NAEA's national conference, she was presented with the prestigious NAEA Bill Payne Advocacy Award – recognizing commitment to advocacy on behalf of enrolled agents. In October 2015 and again in October 2018, at NYSSEA's annual conference, she was presented with the NYSSEA President's Award. Ms. Kubey was selected by NYSSEA to attend the Schuldiner/Smollan Leadership Academy and completed that program in June 2015. SSLA offers leadership training to members of NAEA/NYSSEA who have shown leadership potential. In October 2016 Ms. Kubey was presented with NYSSEA's Excellence in Public Awareness Award.

Ms. Kubey was appointed, in January 2017, to serve on the IRSAC (Internal Revenue Service Advisory Council). The IRSAC, a panel of tax experts appointed from all over the United States, advises the IRS on policy, procedure, programs, and initiatives. She chaired the IRSAC's SBSE/W&I (Small Business/Self-employed and Wage & Investment) subgroup in 2018 and chairs the Wage & Investment subgroup (as the IRSAC absorbed two other advisory councils and split SBSE and W & I into separate subgroups) in 2019. Here's what the IRS Wage & Investment Division covers: <https://www.irs.gov/about-irs/wage-investment-division-at-a-glance>

Ms. Kubey has a Master of Music in voice from The Juilliard School and is also a Certified Teacher of the Alexander Technique. She joined the Board of Directors of Voices of Ascension in January 2019.

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Some “sightings” of Phyllis are here:

2019:

Tax Notes Today (subscription required) 1/17/2019: Underwithheld Taxpayers Get IRS Penalty Relief – William Hoffman: <http://bit.ly/2W1gXfT>

Tax Notes Today (subscription required) 1/28/2019: As Shutdown Ends, Practitioners Mull Filing Season Uncertainties – William Hoffman: <http://bit.ly/2D8FF54>

US News and World Report 1/29/2019: 9 Red Flags That Could Trigger a Tax Audit – Susannah Snider: <http://bit.ly/2G0Hi8M>

<http://bit.ly/2Gn3Xwm>

Reuters 2/11/2019: Your Money: The IRS Form 1040 looks different, in more ways than one – Beth Pinsker: <https://reut.rs/2UQptwH>

Reuters 2/11/2019: Your Money: State taxes are too hard for mere mortals to compute – Beth Pinsker: <https://reut.rs/2HbINRx>

Accounting Today 3/5/2019: How preparers prepare: Do-overs heading into a unique season – Jeff Stimpson: <http://bit.ly/2Tvwo19>

2018:

Accounting Today 1/9/2018: The gig is up: Clients with side jobs often neglect taxes – Jeff Stimpson: <https://www.accountingtoday.com/news/clients-with-jobs-in-the-gig-economy-often-neglect-tax-issues>

Tax Notes Today (subscription required) 2/14/2018: Early Filers May Have to Amend Returns Over Code Changes: <https://www.taxnotes.com/tax-notes-today/tax-system-administration/irs-budget-passthrough-deduction-guidance-top-tax-pros-wish-list/2018/02/14/26wvx?highlight=kubey>

Accounting Today 2/20/2018: Clients are confused about reform’s effects this season – Jeff Stimpson: <https://www.taxprotoday.com/news/clients-are-confused-about-tax-reforms-effects-this-season?feed=00000158-3f60-dcbd-abf8-ff7e9cbd0000>

Tax Notes Today (subscription required): 2/23/2018: Taxpayers, Not Tax Pros, Likely Users of Expected IRS Calculator – William Hoffman: <https://www.taxnotes.com/tax-notes-today/tax-system-administration/taxpayers-not-tax-pros-likely-users-expected-irs-calculator/2018/02/23/26xfw?highlight=hoffman>

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The Balance: What the New Tax Law Means for Small Businesses and Freelancers - Jean Chatzky/Hayden Field: <https://www.thebalance.com/new-tax-law-for-small-businesses-and-freelancers-4158519>

US News & World Report 3/1/2018: Don't be Caught Off-Guard by the Consequences of Your Side Hustle – Susannah Snider: <https://money.usnews.com/money/personal-finance/taxes/articles/2018-03-01/the-tax-consequences-of-your-side-hustle>

Tax Notes Today (subscription required): 3/19/2018: Now Law, New Form 1040SR for Seniors Puzzles Some Tax Pros – William Hoffman: <https://www.taxnotes.com/tax-notes-today/tax-system-administration/now-law-new-form-1040sr-seniors-puzzles-some-tax-pros/2018/03/19/27w6d>

Reuters/US News & World Report 3/20/2018: A New Quagmire for Quarterly U.S. Taxpayers – Beth Pinsker: <https://money.usnews.com/investing/news/articles/2018-03-20/a-new-quagmire-for-quarterly-us-taxpayers>

Accounting Today 3/20/2018: Tax pros rate the season so far: 'Much busier, much sooner' – Jeff Stimpson: <https://www.accountingtoday.com/news/tax-pros-rate-the-season-so-far-much-busier-much-sooner>

Accounting Today 3/27/2018: Refunds and rip-offs: Are clients aware of scams? – Jeff Stimpson: <https://www.accountingtoday.com/news/refunds-and-rip-offs-are-clients-aware-of-tax-scams>

Tax Notes Today (subscription required) 4/3/2018: New Cryptocurrency Taxpayers Complicate Filing Season – William Hoffman: <https://www.taxnotes.com/tax-notes-today/tax-system-administration/new-cryptocurrency-taxpayers-complicate-filing-season/2018/04/03/27xn3?highlight=kubey>

Accounting Today 4/6/2018: IRS now processing “extender” returns – Jeff Stimpson: <https://www.accountingtoday.com/news/irs-now-processing-extender-returns>

Tax Notes Today (subscription required) 4/9/2018: New Cryptocurrency Taxpayers Complicate Filing Season – William Hoffman: <http://bit.ly/2FEvp3P>

Tax Notes Today (subscription required) 4/18/2018: Tax Day E-File Fail Stuns IRS, Worries Filers, Angers Congress – William Hoffman: <http://bit.ly/2w4ootA>

Accounting Today 7-3-2018: Preparers share their initial problems with the TCJA – Jeff Stimpson: <http://bit.ly/2lUSAj5>

CPA Practice Advisor 7/25/2018: National Association of Enrolled Agents to Testify at Senate Hearing on IRS Reform: <http://bit.ly/2uUkYH3>

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Senate Finance Committee Hearing written testimony and archived video:
<http://bit.ly/2LtaMi5>

C-SPAN – Senate Finance Committee Hearing 7/26/2018: <https://cs.pn/2OqkJvs>

Accounting Today 7/26/2018: Senators introduce Bill to make IRS more responsive – Michael Cohn: <https://www.accountingtoday.com/news/senators-introduce-bill-to-make-irs-more-responsive-and-accountable>

Tax Notes Today (subscription required) 9/21/2018: Payroll Companies, Preparers Hail Form W-4 Delay: <http://bit.ly/2P9sRR0>

Accounting Today 10/2/2018: Tax Pro's biggest challenges for next season – Jeff Stimpson: <http://bit.ly/2NknnAQ>

US News and World Report 10/4/2018: What to Know About 401(k) Benefits for Student Loan Payments – Susannah Snider: <http://bit.ly/2CtPH34>

Accounting Today 12/18/2018: Cool for School: Credentials that appeal to tax preparers – Jeff Stimpson: <http://bit.ly/2SaC1OE>

Tax Notes Today (subscription required) 10/29/2018: Self-Prep Return Record No Worry for Tax Pros in Wake of TCJA: <http://bit.ly/2EBxErU>

Tax Notes Today (subscription required) 11/16/2018: IRSAC Report Focuses on Funding, Free File, and Communications: <http://bit.ly/2T6xNro>

Tax Notes Today (subscription required) 12/13/2018: Contingency Fee Proposal Splits Practitioner Community: <http://bit.ly/2V4sRVv>

Tax Notes Today (subscription required) 12/17/2018: A Look Ahead: Tax Pros Hopeful for Smooth Filing Season: <http://bit.ly/2LtpOC9>

Tax Notes Today (subscription required) 12/20/2018: Tax Pros Seek Smooth Transition as IRS Prepares for Fax Moratorium: <http://bit.ly/2EI6PDb>

Older Articles:

Fox News How to Protect Yourself from Tax Fraud (April 2017):
<http://video.foxnews.com/v/5393765550001/?#sp=show-clips>

Associated Musicians of Greater New York – Allegro (April 2017):
<http://www.local802afm.org/2017/03/changes-and-significant-issues-when-filing-your-taxes-this-year/>

nerdwallet, NewsOK, Gainesville Sun: Comb your Closet for Charity – and a Tax Deduction (April 2017):

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<https://www.nerdwallet.com/blog/taxes/non-cash-charitable-donations/>
<http://newsok.com/article/feed/1203037>
<http://www.gainesville.com/business/20170413/comb-your-closet-for-charity--and-tax-deduction>

New York Business Journal (February 2017):

http://www.bizjournals.com/newyork/potmsearch/detail/submission/6405190/Phyllis_Jo_Kubey

IRS Selects New Advisory Council Members IR-2017-17 (February 2017):

<https://www.irs.gov/uac/irs-selects-new-advisory-council-members-2017>

Accounting Today 6/6/2017: Preparers sound off on Congress' IRS budget, priorities:

<https://www.accountingtoday.com/news/preparers-sound-off-on-congress-irs-budget-priorities>

Accounting Today 6/13/2017: Preparers list their biggest do-overs from last season

<https://www.accountingtoday.com/news/preparers-list-their-biggest-do-overs-from-last-season>

Accounting Today 6/27/2017: Pitches and glitches: Tax preparers discuss marketing goofs:

<https://www.accountingtoday.com/news/pitches-and-glitches-tax-preparers-discuss-marketing-goofs>

Accounting Today 6/30/2017: Preparers chime in on recent PTIN ruling

<https://www.accountingtoday.com/news/preparers-chime-in-on-recent-ptin-ruling>

Accounting Today 8/3/2017: The Questions tax preparers just can't ask clients

<https://www.accountingtoday.com/news/the-questions-tax-preparers-just-cant-ask-clients>

Financial Advisor 8/14/2017: 50% Tax on Missed RMDs May Be Waived (Jeff Stimpson)

<http://www.fa-mag.com/news/50--tax-on-missed-rmds-may-be-waived-34128.html>

Accounting Today 10/6/2017: A prime challenge in M & A: Retaining the clients (Jeff Stimpson)

<https://www.accountingtoday.com/news/a-prime-challenge-in-accounting-m-a-retaining-the-clients>

Tax Notes Today (subscription required) 10/19/17: IRS Will Require ACA Compliance in 2018 Returns:

<https://www.taxnotes.com/taxpractice/tax-system-administration/irs-will-require-aca-compliance-coming-filing-season/2017/10/30/1x7fh?highlight=kubey>

Reuters 11/14/17: Your Money: Minimal Relief from prospective death of the dreaded AMT

<https://www.reuters.com/article/us-money-tax-amt/your-money-minimal-relief-from-prospective-death-of-the-dreaded-amt-idUSKBN1DE2IH>

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