

Arizona Notes

Arizona Court Reporters Association

Volume 43, Number 1

Spring 2015

2015 Midyear Seminar *The Ultimate Realtime System - Mind, Body, Machine*

April 25, 2015
Hilton Phoenix Chandler
2929 W. Frye Rd.
Chandler 85224
Hotel Reservations: 480-899-7400
Ask for the ACRA Room Rate: \$99
Room block deadline: April 3, 2015

SCHEDULE

Approved for 6 hours CEU

7:45 a.m.

Registration Opens/ Continental Breakfast

8:30 a.m. - 10:00 a.m.

Working Inside Changes the Outside, Pt. 1

(.15 CEU/ 1.5 hours AZCR)

Speaker: Mark Pirtle, D.P.T.

This three-hour didactic and experiential workshop teaches reporters basic meditation and mindfulness, and how to employ both to reduce stress, optimize work performance, form more intimate relationships, and to be more healthy and happy. Participants will come away with a clear understanding of how to start a simple daily practice to achieve the aforementioned benefits.

10:00 a.m.-10:30 a.m.

Break—Visit with Exhibitors

Continued on page 7

*This year
ACRA
celebrates its
65th year
serving
Arizona
court
reporters*

\$1,000 Visa Gift Card Raffle

You were sent tickets in the mail a few weeks ago, but if you need to purchase more tickets or friends or family want to participate, please direct them to the website online store, www.acraonline.org

Winner will be drawn at the Midyear Seminar - need not be present to win.
Good Luck!

Thank you to **Alliance Reporting Solutions** and **Glennie Reporting Services** for their generous donations of the gift cards.

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How do you go from where you are to where you want to be? I think you have to have an enthusiasm for life. You have to have a dream, a goal. You have to be willing to work for it. ~ Jim Valvano

President's Message



Pam Griffin, RPR, CRR

I don't know about you, but these days seem to be flying by. Since the NCRA annual convention in August, much of our energy has been focused on students, starting with our National Court Reporters and Captioning Week in February.

Our first event of the week was held at Glennie & Associates. We had a turnout of 19 students and 10 court reporters, and before the end of the evening, all students were sponsored for membership by every court reporter in the room! Some sponsoring two. It was my honor being able to speak to these students, our future. Thank you, Carolyn Sullivan, for your work in putting this together and making it

such a success. In addition, we set up every student in that room that wanted a mentor with a mentor. This is the spirit of volunteerism! Thank you to those court reporters who attended this event and/or sponsored a student: Carolyn Sullivan, Lisa Glennie, Laura Ashbrook, Kate Roundy, Karla Martin, Rosina Seymour, Diane Donoho, Wilma Weinrich, Kelly Ohlhausen and Linda Cantrell.

The week ended with the happy hour that again brought out a few students and a few reporters. We had a little more one-on-one time with the group in a comfortable setting. Thank you, Karla Martin, Rosina Seymour, and Jennifer Honn for attending this event! Though we had a small group, we had a great time!

Right on the heels of that Court Reporters and Captioning Week, we moved right into the TRAIN educational seminar lead by Pam Mayer. Myself, Pam, Cathy Taylor, Kim Portik and Teresa Vanmeter assisted Pam in the session. We had Stenograph, Eclipse, ProCat, Digital Cat all represented by reporters who wanted to perfect their realtime skills. Pam kept the session to a small group of seven so that more attention could be given to each reporter. We started at noon and ended at 5:00, and we couldn't believe the time had gone by so quickly! I would encourage anyone who is interested in writing realtime for attorneys to take advantage of this session. One of the comments by a seasoned reporter was summed up like this: This has been the best, most informative training or seminar I've attended ever put on by either NCRA or ACRA.

I'm sure we will have held our second session for the officials at the courthouse by the time this newsletter comes out. If you would like to participate in one, jump on the "train" quick. The word is spreading how good this event is, by people who truly want you to be the best you can be! Don't miss out. On March 9th and 10th, we participated in the Arizona School Counselors conference at the WeKoPah Resort in Fountain Hills. And, once again, another successful event thanks to all of you! We asked, and you answered! This, without a doubt, was well worth our time, energy, and funds that were put into this two-day event. Having a visual demonstration of what we do to school counselors all across our state left them in total awe. We had a vision, we had a goal, we had the volunteers, and we had the support! Aside from making an impact on the attendees at the convention, we now have our marching orders and will be hitting the road to different schools around the state! If we happen to be

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coming to your city, and you would like to be a part of going to schools for demonstrations or to speak to the students, please let us know by contacting Robin Hirth, executive director, and she will forward your name on to the committee. Thank you, Kim Portik, for spearheading this committee. It was a pleasure working with all of you: Kim Portik, Doreen Sutton, Karla Martin, Cathy Taylor, Danielle Griffin Cadena and Laura Ashbrook.

For now, as we say goodbye to our lobbyists, John McDonald and Dana Paschke, this doesn't mean that we are letting them go completely. Although they won't be in a contract with Arizona Court Reporters Association, we are fortunate to have a relationship that consists of a deep respect for their counsel, their presence, and their vast knowledge of the legislature and court reporting, and they will continue to look

out for court reporters and what might affect us in any way, shape, or form. At any time that we need them, they will be there for us. If you would like to send a note to John, who was most visible for our group, his e-mail address is john@azpolicy.com.

This is where your TPC committee comes in. This committee has always monitored and stayed abreast of what is going on in our field, both locally and nationally. Your membership in this association assures you this committee and your board is advocating for your job and advocating for your profession. Your membership provides you the ability to express your views and your opinions, whether they are or are not in agreement with others. As leaders and as volunteers or just being a member, professionalism must always carry the day. In order for this association to thrive and be relevant, we must always

remember to conduct ourselves with integrity and with respect for each other.

Lastly, I have to mention our fundraising committee, headed up by Rosina Seymour. We are excited to be rolling our new fundraising events coming up. We have an aggressive campaign for raising money, and I know we can do it! You will be hearing more later as everything becomes finalized. Thank you in advance for your participation, excitement, and funds!

Whichever way you are able to support ACRA, it is greatly appreciated. We need you: Today, tomorrow, and in the future.

See you next month at the Midyear Convention at the Hilton Phoenix Chandler!

A Message from John MacDonald

In almost 25 years as a lobbyist, nothing has given me more satisfaction than representing the Arizona Court Reporters Association, an honor I've now had, along with my partner (and wife), Dana Paschke, for nearly 12 years. To represent a dedicated, talented group of professionals, many of whom are also small business owners, has been deeply satisfying. Whether dealing with the Keeping The Record Committee "back in the day" or battling over the issue of "contracting" more recently (and many issues in between), Policy AZ has been proud to fight on the side of professionalism, ethical conduct and public protection, three pillars continually at the forefront of ACRA's mission.

The future will have no shortage of challenges for Certified Court Reporters in Arizona. Technology continues to advance, court budgets continue to exist under enormous downward pressure and large corporations are continually looking for ways to capture previously untapped markets. Also, the Arizona Legislature, along with Governor Doug Ducey, have embarked upon a "less regulation, more private enterprise" path that could spell both opportunity and peril for ACRA. A wary eye is warranted.

But one thing that will not change is the status of Certified Court Reporters as the "gold standard." There is no suitable replacement for an educated, talented professional adhering to rigid ethical standards when it comes to preserving the judicial system's most sacred element: the public record. Fighting to maintain that status has been a privilege for which Dana and I are most grateful.

John MacDonald
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Watch Out: 11 Tax Changes that Might Affect Your 2015 Tax Return

By Jonathan Medows

There are many tax changes that were implemented in 2014 or are now in effect for 2015 which may affect your individual return. From Obamacare to tax hikes and changes to standard deductions, there's a lot to keep track of. To help you get organized for this tax season and beyond, review this summary of some of the most significant tax issues and changes you should be aware of.

1. Obamacare Penalties Kick In

The actionable component of Obamacare is the individual mandate goes "live" this tax season, requiring that consumers purchase health insurance or face a penalty of \$95 or 1% of their annual income, whichever is greater. The penalty is \$47.50 per child, up to \$285 for a family. If you're not covered for the entire year, you'll pay the full penalty; if you only lack coverage for part of the year, you'll pay 1/12 of the penalty per month you were without coverage. And if you only lacked coverage for three months or less, you won't pay a penalty. To see health insurance options in your area, check out our National Benefits Platform [here](#).

2. Changes to Flexible Spending Accounts and FSA limits:

2014 was a big year for health care-related tax changes. If you take advantage of a Flexible Saving Account (FSA) to help pay for future medical expenses with pretax dollars, you should note that in 2014 Congress made a change so that if you carry over funds (up to the \$500 maximum carry over limit) into 2015, you will be disallowed from participating in an HSA in 2015.

The annual limit on employee contributions to flexible spending accounts is now \$2,550 for qualified health care expenses. That's up \$50 from 2014, so make sure you opt in for this new maximum amount if you take advantage of a health care FSA.

3. Only One Annual IRA Rollover Allowed

Up until now, individuals could use tax-free rollovers for each of their IRA's. Starting in 2015, only one tax-free IRA rollover will be allowed for a period of one year for any number of IRA accounts. This includes SEP, SIMPLE IRA's, Roth, and Traditional IRAs.

4. Income Tax Rate Changes

The American Taxpayer Relief Act of 2012, or ATRA, added a seventh federal income tax bracket (39.6%) in 2013, while the remaining six rates were unchanged. In 2014, taxable incomes above the following thresholds now fall into the 39.6% bracket: Married Filing Separately (\$228,800), Unmarried Individuals (\$406,750), Head of Household (\$432,200), and Married Filing Joint Returns (\$457,600).

5. Capital Gains Tax Updates

ATRA also made several important changes to the treatment of capital gains, and eliminated sunset provisions, adding stability and permanence to these rules including:

Income Threshold Changes: Individuals in the 10% and 15% tax brackets will pay 0% on eligible dividends and most capital gains.

Qualified Dividends: income received will be taxed at the same rate as long-term capital gains.

Tax Rate: individuals in the 25%, 33%, and 35% federal income tax brackets will pay 15% on capital gains, while taxpayers in the 39.6% bracket will pay 20%.

Unmarried individuals (Single) with income over \$200,000 and Married couples filing jointly with income over \$250,000 will also pay a 3.8% Medicare surcharge tax on investment income; thereby increasing the effective rate on capital gains to 23.8% (20% + 3.8%).

6. Standard Deduction

The standard deduction—that is, the basic tax break extended to all Americans each year—rises to \$6,300 for single filers and \$12,600 for married taxpayers filing jointly in 2015. That's up \$100 and \$200, respectively, from 2014 figures. The standard deduction is crucial to tax planning and withholding, because if you cannot itemize enough deductions to surpass this amount, this is the only tax break the government will likely be giving you on next year's tax return.

7. Tax Brackets

For the new tax year starting in January, income tax thresholds have again been adjusted up for inflation. The highest tax rate of 39.6%, for instance, will now apply to single filers who make over \$413,200 and married couples making \$464,850. Both figures

are up about 1.6% from tax year 2014. For more information on specific income tax brackets by filing status, check out the latest IRS revenue procedure document.

8. AMT Changes

The so-called "alternative minimum tax" is quite a headache for many middle-class Americans. Since certain breaks can significantly reduce your tax bill, the IRS created the AMT to set a limit on those benefits – and ensure a minimum tax burden on you. The Alternative Minimum Tax exemption amount for tax year 2015 is \$53,600 for individuals or \$83,400 for joint filers. That's up slightly, about 1.5% from 2014.

9. Social Security and Medicare

As was the case in the past, all wages earned in a given year are taxed at the 1.45% rate for Medicare. On your 2014 tax return, wages paid in excess of \$200,000 for Unmarried filers and in excess of \$250,000 for Married filers will be subject to an extra 0.9% tax. The Social Security tax rate remains at 6.20%, while the wage limit, or Social Security maximum, increases from \$113,700 to \$117,000. The Cost of Living Adjustment (COLA) was 1.5% in 2014, raising the SSI limit to \$2,642 per month.

10. Unified Credits, Gift Tax and Estate Tax

ATRA also increased the estate and gift tax rate from 35 to 40%. The gift tax and estate tax exclusion continue to be indexed for inflation and increase to \$14,000 and \$5.34 million respectively in 2014.

11. Standard Deductions

According to the IRS, approximately two out of every three taxpayers claim the standard deduction on their income tax returns. For 2014, there was a change to the standard deduction amounts for all individual taxpayers, including:

Single (Unmarried Individuals): \$6,200, an increase of \$100

Married Filing Separately: \$6,200, an increase of \$100

Head of Household: \$9,100, an increase of \$150

Married Taxpayers Filing Jointly and Qualifying Widow(er)s: \$12,400, an increase of \$200

With a plethora of tax changes instituted last year and for the coming year, it is likely that you will notice the impact of several of them as you prepare to file your 2014 taxes. If you have never engaged a tax professional before to help you in your tax preparation or planning, this may be the year to do so to ensure that you reduce your tax obligations as much as possible and to avoid any costly penalties.

Jonathan Medows is a New York City based CPA who specializes in taxes and business issues for consultants across the country. His website, www.cpaforfreelancers.com, has a resource section with how-to articles and information for freelancers.

Arizona School Counselors Association Convention

On March 9th and 10th, ACRA was honored to sponsor a vendor booth at the Arizona School Counselors Association annual convention at the WeKoPa Convention Center at Fort McDowell.

The Arizona chapter of the association boasts 550 members, and ACRA saw it as a perfect opportunity to expose our amazing profession to those individuals with the most potential influence on career choices of our state's youth!

Our vendor booth was openly inviting and attracted not only a large gathering of counselors, but we were able to network with several other vendors who have asked to be kept abreast of our outreach efforts as a possible way to work together in the future!



Our team worked hard for several months in preparation for this event and many of you contributed financially, and it paid off!!! No one could miss our table: standup, six-foot banner displaying the CRTakeNote information, ACRA table skirt, iPad mini to be raffled off, the best give-aways at the conference, and, of course, candy. It was all topped off with lots of information and conversation

about Gateway Community College and the online College of Court Reporting – lots of technology and lots of fun.

There were seven members of ACRA on our team, and we all attended the event. We displayed our realtime technology by writing conversations with the counselors themselves and projecting on a screen behind our table as well as displaying our text on an iPad at the edge of the table. It was the perfect way to personalize the interaction and talk about all facets of reporting: courthouse, freelance, CART, and captioning. Because our realtime display was live, we were able to personally interact with each person, and they could feel how genuine we were – there was clearly no “canned” presentation.



The most telling comment we heard over and over was, “I knew court reporters existed, but I never thought about recommending it to my students.” Many counselors also mentioned they had no idea it is steno writers who provide captioning for television nor that we served the hard-of-hearing community, and it was an eye-opening experience for many of them.

We were truly blessed by this opportunity to mix and mingle with these very important members of our school system. We already have invitations and committed dates to visit schools and attend career fairs all over the state, so we will be taking our act on the road!!!!

ACRA would like to say a HUGE thank you to our HIGH SCHOOL OUTREACH TEAM:

Cathy Taylor, Danielle Cadena, Doreen Sutton, Karla Martin, Kim Portik, Laura Ashbrook, and Pam Griffin.

Even more importantly, we would like to say THANK YOU to the following people who donated cash and/or supplies. Without these donations we would not have been able to make such a large impression:

Diane and Allen Sonntag, \$100
 Carolyn Sullivan, \$100
 Cathy Bamford, \$200
 Scott Coniam, \$190 - banner and stand
 Mary Onuschak \$100
 Rossana Baker, \$100
 Karen Kahle, \$100
 Kelly Palmer, \$50
 Julie Ottmar, \$100
 Pam Remis, \$20
 Cindy Lineburg, \$100
 MaryLynn LeMoine, \$50
 Helene Paulsan, \$50
 Lisa Glennie, \$100
 Esquire Reporting, \$350, give-aways for table
 Anita Landeros, \$200, give-aways for table

Laura Ashbrook \$100

Theresa Aguilar \$50

Pam Mayer \$50

Doreen Sutton, T-shirts customized for the event

Doreen Sutton, Pam Griffin, Kim Portik, Cathy Taylor, 550 hand sanitizers for tote bags

Arizona Commission for the Deaf and Hard of Hearing, give-aways for table



2015 Midyear Seminar

10:30 a.m. - 12:00 p.m.

Working Inside Changes the Outside, Pt. 2

(.15 CEU/ 1.5 hours AZCR)

12:00 p.m.-1:30 p.m.

Business Luncheon

1:30 p.m. - 3:00 p.m.

Jump on the TRAIN!

(.15 CEU/ 1.5 hours AZCR)

Speaker: Pam Mayer, RMR, CRR

The TRAIN (Taking Realtime Awareness and Innovation Nationwide) has arrived in Arizona! In this seminar, you'll learn what TRAIN's goals are and what we've been doing locally over the last few months. We'll have a panel of realtime reporters ready to answer any questions/fears/concerns you have about providing realtime and to share their interesting/funny/awkward experiences. Pam will also be sharing some of her favorite briefs and realtime macros. We want this to be a very interactive seminar, so please bring any briefs, macros, or realtime stories that you'd like to share!

3:00 p.m.-3:30 p.m.

Break—Visit with Exhibitors

3:30 p.m. - 5:00 p.m.

What Makes a Good CART Provider?

(.15 CEU/ 1.5 hours AZCR)

Speaker: Michele Michaels, Arizona Commission for the Deaf and Hard of Hearing

Providing CART services for the Deaf or Hard of Hearing person requires skill, knowledge, and flexibility. CART is a vital and cherished service to those with hearing loss. It can also be financially and personally rewarding. Come and learn about what you should pack in your CART when working with the Deaf and the Hard of Hearing population. Hear from the consumer's perspective as well as what other CART providers have learned over time.

To register, go to www.acraonline.org/ Upcoming Events page

Important Contact Information

ACRA Office: (480) 496-4010 (Robin Hirth), office@acraonline.org ❖ www.acraonline.org

CR Office: (602) 452-3878 ❖ www.supreme.state.az.us/cr



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ARIZONOTES DEADLINES

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