

Nationwide Tax Forum

199999







REGISTRATION BOOKLET



"Best seminars I have been to. IRS is really working with us!"

Kathy Carson Jackson Hewitt Tax Service, Philadelphia, Pennsylvania

"Great Forum! I really learned a lot over the two days. Keep up the good work!"

Regina Schurman Comprehensive Business Solutions, Chicago, Illinois

"This Tax Forum was Great!"

McArther Britt Sr. Britt Tax Service, Seabrook, Maryland

"IRS has done a great job in organizing and presenting the overall Forum and the individual seminars."

Harry F. Coffman CPA, Virginia

"I have attended for five years. 1998 has been outstanding!" Patricia K. Cooty *Texas*

"I think everything was great! I enjoyed each section."
Norma Johnson, Fox and Vito, Louisiana

"This has been the best IRS Forum I have attended." Larry J. Mouton's Accounting and Tax Service, Lafayette, Louisiana

"Information presented has been very good! I've been very impressed and pleased with the seminars themselves."

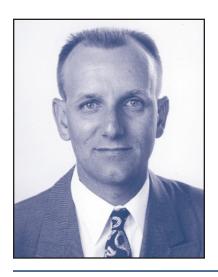
Lisa B. Karph Long Beach, California

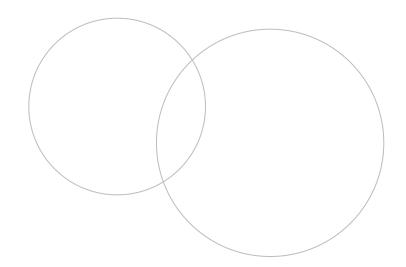
"I was very impressed. This was very helpful!."

K.H. Dimisiponls Teachers Financial, San Diego, California

"We really do enjoy them, you don't realize how much they help until you get into the tax season."

Greg Elkins Accounting Plus Tax Service, Orlando, Florida





Introduction

On behalf of the men and women of the IRS, and particularly those you will come in contact with during these tax forums, I wish to welcome you to the 1999 edition of the IRS Nationwide Tax Forums. It is our intention to provide you with the latest, most complete information available concerning IRS programs, practices and policies.

I have directed the IRS personnel responsible for organizing these events to provide a program specifically designed to respond to the needs of the tax professional community.

At this year's shows, you will find a significantly greater number of topics available to you, presented by the finest group of instructors we have ever assembled for these forums. Our commitment to you, as reflected in this year's forums, is best demonstrated in the IRS motto, "Working to put Service First."

Robert E. Barr

Robert E. Barr

Assistant Commissioner

Electronic Tax Administration

Major Changes in 1999

Veterans of the IRS Nationwide Tax Forums will immediately recognize major changes in the format of this year's shows. Three days of seminars instead of two will obviously increase the opportunity to attend the seminars of your choice. Additionally, participants will find a variety of seminars during the three days more specific to their individual needs. For those seeking Continuing Professional Education (CPE), the number of credits increases to eighteen from last year's twelve.

The opportunity to interact with IRS executives and other tax professionals is greatly expanded in both formal and informal settings. The addition of an "awards dinner", included in the price of admission promises to be a major event. It is designed to provide the kind of informal setting for the exchange of professional information and ideas which makes these tax forums so valuable to the tax professional community.

Carefully review the schedule of seminars. In the past we have had a one day schedule and repeated it on the second day. That is not the case this year. Most seminars will be repeated to afford maximum choice by participants. Some may begin the first day and be repeated the second, while others will have their first presentation on the second day of the show and be repeated on the third. We recommend that first time participants plan to spend the full three days with us for maximum benefit. Veterans will find the second and third days most attractive to their needs. CPE seeking participants will find all three days interesting, informative and well worth spending with us. These Tax Forums remain the most inexpensive way to acquire these valuable CPE Credits anywhere.

Special Note To First Time Participants

The first day of the show will focus on fundamentals. Although we will offer a full slate of other seminars for the convenience of forum veterans, and for those wishing to accumulate the maximum number of available CPE credits, the purpose of this day is to concentrate on the needs of first time participants and those new to the IRS *e-file* program.

The Seminars

In each of the past three years, the number of IRS executives participating as speakers has increased, providing the participants with the latest "word" directly from the IRS official in charge of the particular area or program being discussed in the seminars. That trend will continue, and the number of IRS executives present at the Tax Forums – and actively participating – will grow substantially this year. We have included a number of events specifically structured to allow the participants one on one access to regional, district and headquarters officials, for the purpose of providing you an opportunity to give us direct feedback on our programs and policies.

The Vendors

We invite your attention to the many vendors displaying their products in the exhibit area. An information sheet identifying each vendor, and his/her location within the exhibit area, is contained in the package you will receive at the registration counter. Please visit the exhibit area throughout the Forum. Opening and closing times for the exhibit area are indicated in the schedule portion of this brochure.

Professional Credit

Attendance at these seminars will qualify for Continuing Professional Education (CPE) Credits for Enrolled Agents. Other professional groups should consult with their respective licensing agencies regarding acceptability of credit. Each seminar qualifies for one CPE credit. Because of concurrent seminars, the maximum number of CPE credits available to be earned is eighteen.



Registered with the National Association of State Boards of Accountancy as a sponsor of continuing professional education on the national Registry of CPE Sponsors. State Boards of Accountancy have final authority on the acceptance of individual courses. Complaints regarding registered sponsors may be addressed to NASBA, 150 Fourth Ave. North, Suite 700, Nashville, TN. 37219-2417.

Admission Fee

The admission fee remains modest and covers the administrative costs of the forums accrued by the management firm we hire to perform logistics and other chores. Included in the fee are the reception at the conclusion of the first day, and the awards dinner at the conclusion of the second day. Other food events, such as breakfasts, coffee etc. may be sponsored by individual vendors participating in the Forums.

The basic fee for this year's shows is \$45. Businesses need pay the full amount for the first participant only. The second attendee from the same business or organization pays \$35, and all subsequent members of the same business, or organization, or spouses of paid participants pay \$20. With fees this low, the cost of administering refunds would be prohibitive, and so there will be no refunds.

Details concerning the admission fee, and how it applies to your situation, can be obtained by calling Public Affairs International at 301-445-8100.

Awards Dinner

The awards dinner at the conclusion of the second day is designed as an event which main purpose is to provide an informal setting in which participants, vendors and IRS personnel may meet to exchange information and ideas. It will feature a guest speaker and, as the title implies, will be the forum for presenting various awards to members of the tax professional community.

Arrangements for such an event require a great deal of prior planning especially because of the numbers of people involved. Numbers also dictate that this cannot be a "pay as you go" affair. Since it is part of the total package please join us for what will be an eventful and interesting evening meal. Although we will do our best to accommodate those who choose to register on site, only those who pre-register will be guaranteed a seat.

Schedule

Day One

Registration begins at 7:00am
Seminars are from 8:30am - 11:30am and 1:00pm - 4:00pm
Lunch is from 11:30am - 1:00pm
The exhibit hall will be open from 10:00am - 5:30pm
A welcoming reception will be held in the exhibit hall from 4:00pm - 5:30pm

Day Two

Registration begins at 7:00am Seminars are from 8:30am - 11:30am and from 1:00pm - 4:00pm The exhibit hall will be opened from 9:00am - 5:00pm Lunch is from 11:30am - 1:00pm Dinner will be served from 6:30pm to 8:00pm

Day Three

Registration begins at 8:00am Seminars are from 8:30am - 11:30am and from 1:00pm - 4:45pm The exhibit hall will be open from 9:00am - 2:00pm Lunch is from 11:40am - 1:30pm

The Seminars

The Taxpayer Advocate Programs - How to Help Clients

Practical ways to access the Taxpayer Advocate's programs. The impact of the IRS Restructuring and Reform Act of 1998 and the expanded Taxpayer Assistance Order definition will also be discussed

More Ways, More Choices - New Payment Methods for Individuals

Come hear our Year 2000 expansion plans for alternative payments pilots, including the use of credit cards to "pay by phone" or "e-file and pay." Results of the 1999 pilots and expansion of current balance due payment applications to other types of individual tax payments will also be discussed.

Electronic Form 1041's - Trusts You Can File/Filing You Can Trust

An overview of the entire process of filing Forms 1041 electronically.

Examination and Compliance Issues

Topics will include selected provisions of the IRS Reform and Restructuring Act of 1998 (Innocent Spouse Relief, Burden of Proof, Accountant/Client Privilege, Third Party Contracts), Earned Income Credit compliance strategies, and a discussion of alternative treatment initiative and other outreach activities.



A Prescription For Success

Allergic to paper? Let us prescribe the latest developments and initiatives on electronic filing of your information returns, Forms 1099,1098,5498,W-2 and 1042S. You'll feel so much better after seeing a computer demonstration on how easy it is to file your returns electronically.

For the Computer Geek in Each of Us

Current and future methods of transmitting tax data to the IRS. Featuring accepted asynchronous and bisychronous communication protocols and Electronic Data Interchange (EDI).

Resolving Preparer's Issues with the IRS

Join us in a discussion of Power of Attorney (POA), including IRS employee input, update and research capability, broadening input of POA's from Service Center to point of receipt, POA Form 2848 and current efforts to accept oral Tax Information Authorizations (Form 8221) and the future of electronic authorizations.

EFTPS Government/Industry Panel

A moderated panel discussion featuring Treasury and industry representatives. Hear the latest information about the Electronic Federal Tax Payment System (EFTPS) and learn how industry representatives are using this system for their own business and for their clients.

I'm a Little Short This Month

Learn about the collection process, third party notification requirements, installment agreements, new offer in compromise provisions, and more. This information packed session includes dramatic changes to collection practices and significant new rights to taxpayers granted in the Restructuring and Reform Act of 1998.

IRS *e-file* for Beginners

Overview of the requirements to become an authorized IRS e-file provider, from the application process through your first return.

So You Wanna Buy Software?

Come find out what to look for when shopping for tax preparation software and the importance of Form 8453.

Isn't it Time For a Good Foreign Investment?

Are the words suitability, monitoring and appeals foreign to you? Invest in your future by attending a general overview of the Revenue Procedure requirements related to the benefits of being an Electronic Return Originator (ERO) in good standing.

Electronic Filer Suitability (Advanced Seminar)

How administrative appeals are reviewed after an electronic filer is rejected or suspended from the *e-file* program.

Director of Practice Operations (Advanced Seminar)

Circular 230 disciplinary matters, applications for enrolled agent status, proposed amendments to Circular 230, and power of attorney issues.

Knock, Knock - Who's There?

Learn how to "get them in the door" and market your business by using the same IRS database the country's largest e-filers use to open new offices and identify prime customers.

IRS e-file - Start Spreading the News!!

Learn about IRS marketing efforts to spread the word about IRS *e-file*. Hear about our paid advertising and public service campaigns, radio spots, TV advertisements and how you too can benefit from them. This presentation focuses on the IRS *e-file* marketing campaign and research strategies that can assist you in maintaining your old clients and attracting new ones. Come see what we have to offer to increase your business.

EITC Survival Tips

Here's everything you need to know about the taxpayer who claims the EITC credit. Join us in a discussion of specific pitfalls impacting practitioners such as duplicate EITC claims, and current research projects pertaining to them.

Updates

The latest updates on a variety of electronic filing methods including the "Year 2000".

Principals - Apply Now!

Let IRS staff assist you in a step by step process to complete an application to participate in the IRS *e-file* program (Form 8633). Included in this offer are free handiwipes to those who are fingerprinted. Additional information is located on the web site under Electronic Services at the internet address: http://www.irs.ustreas.gov.

Panel Discussion

Hosted by the Regional ETA Coordinators and featuring Industry Representatives. An open discussion of personal experiences with IRS *e-file*.

Earned Income Tax Fraud Prevention - Panel Discussion

A moderated panel discussion featuring criminal investigation personnel and focused on EITC fraud prevention.

Reach For The STAWRS!

The Simplified Tax and Wage Reporting System a.k.a. STAWRS is an active partnership between private employers, state governments and Federal Agencies for the purpose of developing, testing and transitioning concepts that simplify the employment tax and wage reporting process. Join us in the three major areas of emphasis – Single Point Filing – Simplified Requirements – One Stop Customer Service.

Marketing for Electronic Business Options

The IRS is working to reduce the filing burden for businesses, reporting agents, and preparers. Learn about the latest updates from the Electronic Tax Administration office about the IRS planned marketing strategy and products for forms 941, 1065, 1041's etc..

Overview of Appeals:

Covers the mission of Appeals, how practitioners interact with Appeals and selected Appeals dispute resolution programs.

Eight - 0 in 0- Seven:

That is the IRS goal, to have 80% of all tax returns electronically filed by the year 2007! Learn how you can help and profit by analyzing Strengths, Weaknesses, Opportunities, Threats, by segmentation, and by target marketing.

Someone To Watch Over Us:

This presentation will describe how the new Office of the Treasury Inspector General for Tax Administration will be conducting audits and investigations of IRS activities, programs and operations. We will emphasize changes to our new organization and highlight the Treasury Inspector General's role in administering the provisions in Section 1203 of the Restructuring and Reform Act of 1998.

Focus Group

Continuing a program we began last year we will again randomly select participants for voluntary participation in a focus group. The purpose of the focus group is to solicit your ideas and opinions about some practitioner incentives and services the IRS is considering.

Travel Savings

Special air fare rates are available through U.S.Airways for the Atlantic City show by calling 1-800-334-8644 (ask for Gold File #78170957). For Fort Lauderdale, Dallas, and Reno call Southwest Airlines at 1-800-433-5368 (ask for Gold File #K9419, K9429, K9439 respectively). For the Cincinnati and Atlanta shows call Delta Airlines at 1-800-241-6760 (ask for Gold File #DMN 125687A).

Special rental car rates are available through HERTZ by calling 1-800-654-2240. Use Gold File #CV48080 in all cities.



Time Seminar Room 1 Seminar Room 2 Seminar Room 3 Seminar Room 4

Day 1

08:30a - 09:20a	e-file for Beginners	A Prescription For Success	Someone To Watch Over Us	
09:20a - 09:40a	BREAK	BREAK	BREAK	BREAK
09:40a -10:30a	Isn't It Time For A Good Foreign Investment?	Examination and Compliance Issues		
10:40a - 11:30a	IRS <i>e-file-</i> Start Spreading the News	Taxpayer Advocate Programs		
11:30a - 01:00p	LUNCH	LUNCH	LUNCH	LUNCH
01:00p - 01:50p	Marketing for Electronic Business Options	EFTPS Government and Business Panel	Principals Apply Now!	
02:00p - 02:50p	So You Wanna Buy Software?	Resolving Preparer's Issues with the IRS	Overview of Appeals	
02:50p - 03:10p	BREAK	BREAK	BREAK	BREAK
03:10p - 04:00p	Knock, Knock Who's There?	I'm a Little Short This Month		
04:00p - 05:30p	RECEPTION	RECEPTION	RECEPTION	RECEPTION

Lunch and the reception will be held in the exhibit hall.

Day 2

08:30a - 09:20a	Panel Discussion Featuring IRS and Industry Representative	EITC Survival Tips	Someone To Watch Over Us	A Prescription For Success
09:20a - 09:40a	BREAK	BREAK	BREAK	



Time Seminar Room 1 Seminar Room 2 Seminar Room 3 Seminar Room 4

09:40a - 10:30a	Panel Discussion (Continued)	Taxpayer Advocate Programs	For The Computer Geek In Each Of Us	Resolving Preparer's Issues with the IRS
10:40a - 11:30a	Examination and Compliance Issues	EFTPS Government and Business Panel	Reach For The STAWRS	
11:30a - 1:00p	LUNCH	LUNCH	LUNCH	LUNCH
01:00p - 01:50p	Eight - 0 in 0 - Seven	I'm A Little Short This Month	Electronic Filer Suitability (Advanced Class)	Overview of Appeals
02:00p - 02:50p	Eight - 0 in 0 - Seven (Continued)	More Ways, More Choices New Payment Methods For Individuals	Director of Practice Operations (Advanced Class)	Electronic Form 1041 Trusts You Can File/ Filing You Can Trust
02:50p - 03:10p	BREAK	BREAK	BREAK	BREAK
03:10p - 04:00p	Knock, Knock Who's There?	Updates	Earned Income Tax Fraud Prevention Panel Discussion	Marketing For Electronic Business Options
06:30p	Awards Dinner	Awards Dinner	Awards Dinner	Awards Dinner

The awards dinner will be held in the designated area of the hotel. In Atlantic City the dinner will be held at Caesars Palace. Ask any IRS person for directions if necessary.





Time Seminar Room 1 Seminar Room 2 Seminar Room 3 Seminar Room 4

Day 3

08:30a - 09:20a	Eight - 0 in 0 - Seven	EITC Fraud Prevention Panel	IRS <i>e-file</i> - Start Spreading the News	
09:20a - 09:40a	BREAK	BREAK	BREAK	BREAK
09:40a - 10:30a	Eight - 0 in 0 - Seven (Continued)	Electronic Filer Suitability (Advanced Class)	EITC Survival Tips	
10:40a - 11:30a	Updates	Director of Operations (Advanced Class)		
11:30a - 01:00p	LUNCH	LUNCH	LUNCH	LUNCH
01:00p - 01:50p	Panel Discussion Featuring Industry Representatives	For The Computer Geek in Each of Us		
02:00p - 02:50p	Panel Discussion (Continued)	Reach For The STAWRS		
02:50p - 03:10p	BREAK	BREAK	BREAK	BREAK
03:10p - 04:00p	Electronic Form 1041's Trusts You Can File Filing You Can Trust	More Ways More Choices New Payment Methods For Individuals		

The exhibit Hall will close at 2:00pm.

S P E C I A L R A T E S

Atlantic City NJ (July 13 - 15)

\$84.00

Ft. Lauderdale FL (July 20 - 22)

\$72.00

Cincinnati OH (August 3 - 5)

\$64.00

Sheraton Atlantic City Convention Center Hotel 2000 Kirkman Blvd. Atlantic City, NJ 08401 1-800-325-3535 609-343-2754

Wyndham Resort and Spa 250 Racquet Club Road Ft. Lauderdale, FL 33326 954-389-3300

Drawbridge Estate I-75 at Buttermilk Pike Exit

Ft. Mitchell, KY 41017 1-800-352-9866 inside KY 1-800 354-9793 outside KY Dallas TX (August 17 - 19)

\$94.00

Atlanta GA (August 31 - Sept 2)

\$97.00

Reno NV (September 7 - 9)

\$54.00

Hotel Inter-Continental Dallas 15201 Dallas Parkway Dallas, TX 75248 972-386-6000

Renaissance Waverly Hotel 2450 Galleria Parkway Atlanta, GA 30339 770-953-4500

Reno Hilton 2500 East Second Street Reno, NV 89595 1-800-648-5080

*The room rates quoted include all applicable taxes and are for single occupancy.



Registration

Avoid long registration lines by mailing or faxing this form! The basic fee for this year is \$45 for the first member of a business or organization, \$35 for the second member and \$20 for each subsequent member of the business or organization and for spouses.

Please remit the appropriate amount by check or money order, payable to Public Affairs International Inc. It is important that each attending member of your organization or business, including spouses complete a registration form. Please print when filling out information below.

Name:				
Telephone:		Fax #:		
Firm/Affiliation:				
Address:				
City:		State	2:	Zip:
Please indicate which	Forum(s) yo	u will be at	tending by ch	necking 🗸 the date(s) below:
Atlantic City, NJ.	□ 13	1 4	1 5	(July 13-15)
Fort Lauderdale, FL.	□ 20	2 1	2 2	(July 20-22)
Cincinnati, OH.	□ 03	1 04	1 05	(August 3-5)
Dallas, TX.	1 7	□ 18	□ 19	(August 17-19)
Atlanta, GA.	□ 31	1 01	1 02	(August 31-September 2)
Reno, NV.	□ 07	□ 08	□ 09	(September 7-9)
I am: 🗖 Tax Practitioner	□ ERO □ C	CPA 🗆 Enro	olled Agent 🚨	Tax Attorney 🚨 Other
Charge: Mastercard	□ VISA □ A	merican Exp	ress	
Please provide the follow	ing:			
Name on card:				
Account Number:				
Card Expiration Date:				
Signature:				
Mail all forms to: Public Affairs Internation 1738 Elton Road Suite 307 Silver Spring, MD 20903 or FAX form to (301) 445- or call (301) 445-8100 e-mail address painternal	2106			
Only participants register a seat at the Awards Banq If you plan to attend the indicate by checking	_l uet. n e awards d i	inner on the		

In order to apportion space for each seminar we request that you make your choice of seminars on the table that follows. This is for general planning purposes only and does not obligate you to attend those seminars.

Day 1

Morning Sessi	ons			
08:30a - 09:20a	☐ Seminar Room 1	☐ Seminar Room 2	☐ Seminar Room 3	☐ Seminar Room 4
09:40a - 10:30a	☐ Seminar Room 1	☐ Seminar Room 2	☐ Seminar Room 3	☐ Seminar Room 4
10:40a - 11:30a	☐ Seminar Room 1	☐ Seminar Room 2	☐ Seminar Room 3	☐ Seminar Room 4
Afternoon Ses	sions			
01:00p - 01:50p	☐ Seminar Room 1	☐ Seminar Room 2	☐ Seminar Room 3	☐ Seminar Room 4
02:00p - 02:50p	☐ Seminar Room 1	☐ Seminar Room 2	☐ Seminar Room 3	□ Seminar Room 4
03:10p - 04:00p	☐ Seminar Room 1	☐ Seminar Room 2	☐ Seminar Room 3	☐ Seminar Room 4
Day 2				
Morning Sessi	ons			
08:30a - 09:20a	☐ Seminar Room 1	☐ Seminar Room 2	☐ Seminar Room 3	☐ Seminar Room 4
09:40a - 10:30a	☐ Seminar Room 1	☐ Seminar Room 2	☐ Seminar Room 3	☐ Seminar Room 4
10:40a - 11:30a	☐ Seminar Room 1	☐ Seminar Room 2	☐ Seminar Room 3	☐ Seminar Room 4
Afternoon Ses	sions			
01:00p - 01:50p	☐ Seminar Room 1	☐ Seminar Room 2	☐ Seminar Room 3	☐ Seminar Room 4
02:00p - 02:50p	☐ Seminar Room 1	☐ Seminar Room 2	☐ Seminar Room 3	☐ Seminar Room 4
03:10p - 04:00p	☐ Seminar Room 1	☐ Seminar Room 2	☐ Seminar Room 3	☐ Seminar Room 4
Day 3				
Morning Sessi	ons			
08:30a - 09:20a	☐ Seminar Room 1	☐ Seminar Room 2	☐ Seminar Room 3	☐ Seminar Room 4
09:40a - 10:30a	☐ Seminar Room 1	☐ Seminar Room 2	☐ Seminar Room 3	☐ Seminar Room 4
10:40a - 11:30a	☐ Seminar Room 1	☐ Seminar Room 2	☐ Seminar Room 3	☐ Seminar Room 4
Afternoon Ses	sions			
01:00p - 01:50p	☐ Seminar Room 1	☐ Seminar Room 2	☐ Seminar Room 3	☐ Seminar Room 4
02:00p - 02:50p	☐ Seminar Room 1	☐ Seminar Room 2	☐ Seminar Room 3	☐ Seminar Room 4
03:10p - 04:00p	☐ Seminar Room 1	☐ Seminar Room 2	☐ Seminar Room 3	☐ Seminar Room 4



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