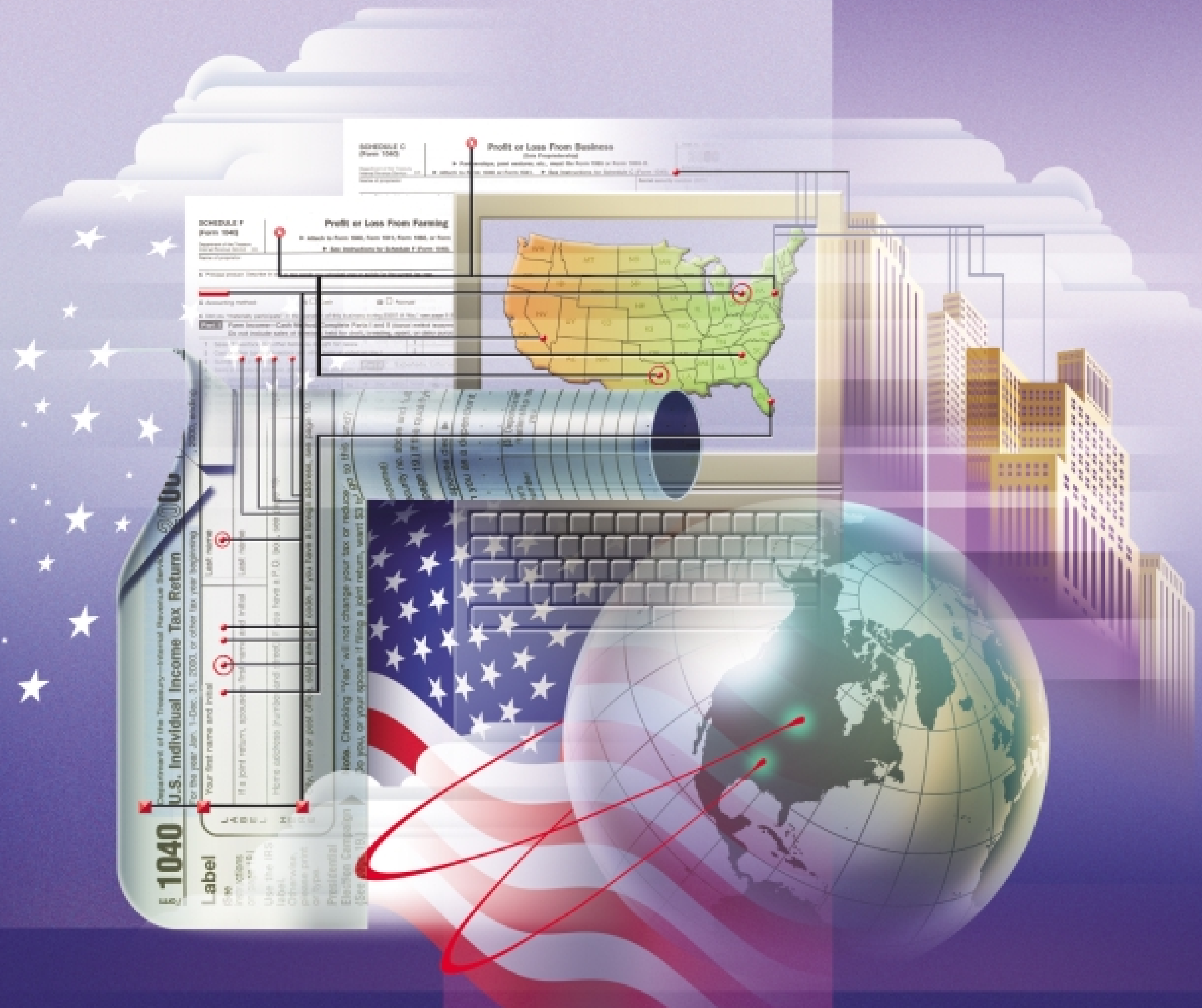
# IRS Nationwide Tax Forums

# 2001

**Registration Booklet**



## A sampling of what past participants said about the Tax Forums:

"Seminar well done! The IRS sold me on *e-file!*"
*Bonnie S. Murrell, Gibsonville, NC*

"Very Pleased!"
*Daniel Toner, Daniel Toner & Associates Chicago, Illinois*

"Your Forums Are Great!"
*David M. Draper, Clinton Electronic Filing, Clinton, Arkansas*

"The Forums are an excellent source of tax information. Keep it up!"
*Cecil Stoner, Advanced TAX, Nashville, Tennessee*

"I feel that each one of your speakers and staff do an excellent job. I also enjoy interacting with IRS personnel!"
*Doris A. Crank, Dory's Bookkeeping & Tax Service, Fernley, Nevada*

"The Tax Forum was excellent this year. Best Ever! Thank you."
*Pearle Wolfe, Scottsdale, Arizona*

"It Was Great!"
*Lois Easter, Manteno, Illinois*

"This is my 6th Nationwide Tax Forum. They have all been very good, but this one is over the top...all of your speakers are so good that I don't want to miss any of them!"
*Kay Marie Sanders, Sanders Income Tax Service, Auburn, Kansas*

"I thoroughly enjoyed my first forum and look forward to attending more in the future."
*Carla R. Brossman, Brossman Accounting and Tax Service, Mead, Colorado*

"You guys are doing great! There is more information than I can absorb. Every subject you do is great!"
*Valerie Vann, TST Tax Service, Portland, Oregon*

"These forums give the IRS a very human, and very likeable face."
*Dennis Graff, DT Graff & Associates, Sacramento, California*

"IRS Booths had a wide and very useful assortment of CD-ROMs, Phone #s, Cards, and Brochures—Thank You!"
*Mary Ramsel, Gregory & Associates, San Andreas, California*

"I see no need to improve such a great product. Thank you for providing this valuable service!"
*Matthew Douglas EA, Douglas Tax Service, Pasco, Washington*

"Thank you for a professional and efficient seminar. Great to see the new IRS innovations and spirit! I'll surely look forward to next year's forum."
*Pam Shea, Medina, Minnesota*

# From the Commissioner

On behalf of the men and women of the Internal Revenue Service, it is my pleasure to welcome you to the eleventh edition of the IRS Nationwide Tax Forums.

We owe the unprecedented success of these forums to you, the tax professional community. Tax professionals continue to play a critical role in helping the IRS achieve its strategic goals. Today, the IRS relies on the relationships it has with tax practitioners and other important stakeholder groups not only for critical feedback on agency policies and direction, but as a valuable resource for communicating with the general public. In fact, the IRS would not have been able to conduct such a smooth filing season this year without the work of dedicated tax professionals like you.

With these important relationships and the support we receive from our stakeholders, communications with taxpayers are more effective, and our outreach efforts are enhanced. We will make sure that these relationships are strengthened as we complete the transition to the new, modernized IRS structure. I am hopeful that these forums will continue to provide you with the tools you need to better serve your customers, and help us all attain the benefits of a fully modernized IRS.

We have made a great deal of progress in the last year, including the stand-up of four new, customer focused operating divisions. Our strategic plan to expand service and improve compliance was completed and approved by the IRS Oversight Board, and Congress released $249 million for Business Systems Modernization. In addition, we rolled-out several initiatives for the 2001 filing season and we are planning to introduce several more in the years to come. For example, during the 2000 filing season, we added 23 additional forms to the 1040 *e-file* Program. We plan to rollout the remaining 40 forms and schedules for 2002. This means we will open *e-file* eligibility to 99.1 percent of all taxpayers, potentially adding 3.8 million new *e-filers* to the growing rolls.

The IRS has also successfully tested the use of a PIN code as the taxpayer's signature. With a few exceptions, the 2001 filing season program extended this option to all taxpayers nationwide who were able to select their own PIN, then file electronically without any paper. In addition, we now have a Taxpayer Authorization Form through which taxpayers can give an Electronic Return Originator the authority to enter their PIN Code. We are also prototyping a Secure Messaging System that will provide participating practitioners with a web-based means for resolving account-related issues. One of our major priorities is to build a secure infrastructure that will permit authorized practitioners to exchange information with the IRS through the Internet.

I am confident that as you attend the forum seminars, and have the opportunity to interact with IRS personnel wearing the red "Staff" ribbon on their badges, you will not only learn more about these initiatives, but you will see that the new IRS is dedicated to top quality customer service, and is ready to assist you in answering any questions you might have about our policies and programs. Once again, welcome to the 2001 IRS Nationwide Tax Forums. Thank you.

Charles O. Rossotti

***Charles O. Rossotti***
***Commissioner, Internal Revenue Service***

# Welcome Aboard

The three-day format introduced two years ago has been met with overwhelming approval and will be continued this year. Three days of seminars will 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. The vendor demonstration room offers an opportunity to assess the products offered by our vendors in a more focused "hands on" atmosphere. For those seeking Continuing Professional Education (CPE), the number of credits available is eighteen.

The opportunity to interact with IRS executives and other tax professionals is greatly expanded in both formal and informal settings. The awards dinner, included in the price of admission, at the end of the second day of activities, is 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.

### Practitioner Case Resolution At The Forums

*As part of IRS' continuing effort to provide top quality service to taxpayers and their representatives, the Atlanta, Philadelphia and Las Vegas Tax Forums will include a pilot program called "Practitioner Case Resolution At The Forums." Authorized taxpayer representatives will be invited to bring their toughest IRS case, or their toughest question regarding IRS tax law and procedures, to the Case Resolution Station. IRS Service Representatives with specialized expertise will be available throughout the three days of the Forum to meet one-on-one with tax practitioners for planned on-site resolution of their case or issue. If the case cannot be resolved on the spot, or requires further research, it will be controlled and assigned to an appropriate IRS expert for follow-up and resolution. IRS Information Booth staff will be available at all six Forums to answer general questions regarding IRS tax law and procedures. A signed original or copy of your Power of Attorney (Form 2848) is required to authorize IRS disclosure of confidential tax information.*

Carefully review the schedule of seminars. As in past years, most seminars will be repeated. However, to afford maximum choice by participants, some seminars 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. *Also, there are several seminars that are only being offered once.* We recommend that first time participants plan to spend the full three days with us for maximum benefit. Veterans and 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.

### Don't Delay— Apply Today

*IRS personnel will be on site to assist you in completing Form 8633,* **Application to Participate in the IRS *e-file* Program.** *Bring your social security card and verification of your birth date to get your application on its way to the IRS for speedy processing. Free fingerprinting will be provided.*

**Enrolled Agents, CPAs, and Attorneys:** *Skip the fingerprinting by providing proof of your professional status (including expiration date).*

## The Seminars

In each of the past four 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 again this year. We have included a number of events specifically structured to allow the participants one on one access to IRS executives and officials for the purpose of providing you an opportunity to give us direct feedback on our programs and policies. Speakers will be available throughout the hotel and exhibit hall area. They are easily identified by their red speaker's badges. Please avail yourself of the opportunity to speak with them, and with the IRS personnel identified by their red IRS staff badges, informally during the course of the forum. As seating is limited, we ask that you plan on arriving to each seminar a little early.


### The Vendors

We invite your attention to the many vendors displaying their products in the exhibit area. An information sheet identifying each vendor, and their location within the exhibit area, is contained in the package you received 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. *Many of our vendors are sponsoring special events this year. Please explore the exhibit hall to take advantage of these opportunities. The exhibit hall will be open the first two days only.*

### 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 is 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, ice cream social, etc. may be sponsored by individual vendors participating in the Forums. The basic fee for this year's tax forums is $55. Businesses need pay the full amount for the first participant only. The second attendee from the same business or organization pays $40 and all subsequent members of the same business, or organization, pay $30, as do spouses. 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 301-593-0200.

### Awards Dinner

On Wednesday evening, please plan to join us for a wonderful dinner honoring Electronic Tax Administration's (ETA), "Exemplary EROs." ETA has selected 50 Exemplary EROs nationwide who will receive special recognition for their *e-file* services.

The Awards Dinner is designed to provide an informal setting in which participants, vendors and IRS personnel may meet to exchange information and ideas. The dinner will feature a guest speaker in addition to honoring various members of the tax professional community.

Because of the prior planning required for the event, we ask that you please register for attendance at the awards dinner in advance by checking the appropriate box on the registration form. Although, we will do our best to accommodate those who choose to register on site, ***only those who pre-register a minimum of 14 days prior to each forum will be guaranteed a seat at the dinner.***

**SPECIAL NOTE:** *Due to circumstances beyond our control, the Las Vegas, NV Nationwide Tax Forum was scheduled during the sacred Jewish holiday of Rosh Hashanah. We apologize for this significant scheduling problem, and reiterate our pledge to schedule the Nationwide Tax Forums during the most convenient yet possible dates and locations.*

# Schedule

## Day 1

| | |
|---|---|
| 7:00AM | Registration begins |
| 8:00AM - 11:40AM<br>1:00PM - 4:20PM | Seminars |
| 11:40AM - 1:00PM | Lunch |
| 9:00AM - 5:30PM | Exhibit Hall open |
| 4:30PM - 5:30PM | Welcoming reception in the Exhibit Hall |

## Day 2

| | |
|---|---|
| 7:00AM | Registration begins |
| 8:00AM - 11:30AM<br>1:00PM - 3:50PM | Seminars |
| 9:00AM - 3:00PM | Exhibit Hall open |
| 11:30AM - 1:00PM | Lunch |
| 6:00PM - 7:30PM | Dinner served |

## Day 3

| | |
|---|---|
| 7:00AM | Registration begins |
| 8:00AM - 11:00AM<br>12:00PM - 2:50PM | Seminars |
| 11:00AM - 12:00PM | Lunch |

**You may register from 7:00-9:00PM the evening prior to the first day of each show.**



# Seminar Topics

### 1. New Lockbox Changes that Tax Professionals Need to Know

We recognize the importance of a strong partnership with you and employ your assistance in ensuring that the taxpayers you serve use the correct mailing addresses and labels when making a federal income tax payment.

### 2. Navigating the New IRS

Learn about the IRS' new way of doing business, with emphasis on practitioner questions such as: Who do I contact to solve my client's problem? Where will I file returns for my individual and/or business taxpayers? Will each IRS office have personnel from each of the new Operating Divisions? Woven throughout the discussion will be the role of the IRS' new relationship managers in enhancing liaison relationships with the tax practitioner community.

### 3. Communicating with the IRS

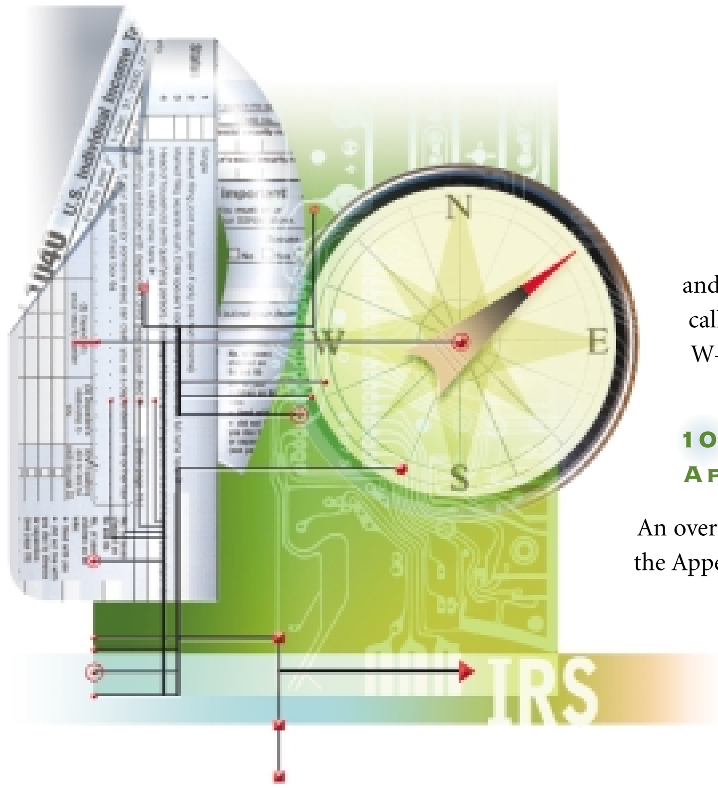
When your client has a problem with the IRS, they expect you to know how to get it resolved quickly! Learning how to communicate with IRS is the secret to your success. Learn who to call, when to write, and how to reach the IRS office that can assist your client in resolving their problem.

### 4. The IRS *e-file* Appeals Process

Know your appeals rights if your application is denied, or if you are suspended from the IRS *e-file* Program. Know what to include in your appeal. Learn how appeals are resolved.

### 5. The FIRE System

Don't get left out in the cold. Learn about the hottest way to file your information return Forms 1042-S, 1098, 1099, 5498, W2-G, 8027, and questionable W-4 using the Filing Information Returns Electronically or FIRE System. This session will cover the advantages and specifications designed exclusively for the electronic filing of information returns, instructions for new filers, common problems associated with electronic filing and a live demo of the FIRE System.




### 6. Forms 1042-S Issues and Answers

Confused by how to file those non-resident alien information returns? Catch this session to learn the requirements for filing Forms 1042-S, *Foreign Person's U.S. Source Income Subject to Withholding,* magnetically or electronically. This session will also include instructions for new filers on how to request authorization to file magnetically or electronically with IRS/MCC.

### 7. Bothered by "B" Notices and Pesky IRP Penalties?

Don't get uptight when you receive a CP2100 ("B") Notice or 972CG Notice from the IRS. This session will define backup withholding, provide an overview of Form W-9, advise the payer what necessary action is required when a CP2100 Notice is received, and outline the steps to establish reasonable cause when a proposed penalty 972CG Notice is received.

### 8. Payroll Pointers For Filers of Forms W-2/W-3

This session will provide you with all you need to know to file forms W-2/W-3 with the Social Security Administration. Learn about the major changes to the tax year 2001 Form W-2/W-3 paper and magnetic media/electronic filing specifications. Hear tips on how to avoid costly mistakes and potential penalty notices.

### 9. Filing Forms W-2/W-3 Electronically with the Social Security Administration

The Social Security Administration began accepting Forms W-2/W-3 electronically over the Internet in tax year 2000. Don't miss out. See a live demo and hear about the free, quick and easy way to electronically file your Forms W-2/W-3 over the Internet.

### 10. The New Appeals

An overview of Appeals and the Appeals process.

### 11. EITC Survival Tips

Here's what you need to know for clients who want to claim EITC or should claim EITC on their U.S. individual income tax returns for 2001. Join us for a presentation on changes in the tax law for tax year 2001 and for information on what is happening at the IRS, including upcoming programs for assistance and education, as well as compliance enforcement plans.

### 12. EITC Panel Discussion

Join us in a discussion of EITC issues faced by tax return preparers, such as due diligence, and IRS' plans for working with preparers in the upcoming year.

### 13. IR$ Data = More Money, More Information

We have the data you want to help increase your business. Working together we can identify your ideal customer. We have the proven products: *e-file* and *e-file* demographics. We will share information from one of the world's biggest databases, as well as a wealth of experience gained by our employees over the years. If you can reach new customers and have them try *e-file*…"you've got em!" And we can prove to you that they'll come back every year.

### 14. How to Get Help for Your Clients

Learn how to work with the Taxpayer Advocate to get help resolving problems with the IRS. Know who to call and what is required to get assistance. You will also learn how to participate with the Taxpayer Advocates in fixing systemic problems through administrative recommendations and legislative proposals.

### 15. Interacting with IRS Electronically

This presentation will provide information on what the IRS envisions for the future.

### 16. e-Services Within a Third-Party Community

Hear the latest status on the development of e-services in our Third-Party Community. Take a snapshot view of the registered user and unregistered user portals planned for 2002.

### 17. Step Into the Future With *e-file*

You can revolutionize your business by becoming an Authorized IRS *e-file* Provider. We'll show you how to get started.

### 18. Stay In The Game

Safeguard your IRS *e-file* business. Learn about IRS *e-file* rules, the responsibilities of an Authorized IRS *e-file* Provider, and how the IRS ensures compliance with IRS *e-file* rules.

### 19. *e-file* Products for Individuals

The IRS has information for you regarding its individual *e-file* programs and options. We will discuss the programs available, the near term enhancements and our long-range plans.

### 20. Minimizing and Working *e-file* Reject Codes

Learn how to research and correct the most common reject codes and how to minimize their occurrence.

### 21. *e-file* Products for Businesses

The IRS has information for you regarding its business *e-file* programs and options. We will discuss the programs available, the near term enhancements and our long-range plans.

### 22. Panel for Electronic Payments for Individuals and Businesses—EFTPS, Credit Card & Direct Debit

Learn about the expanded electronic payment options being offered to business and individual taxpayers. This includes the latest information on the EFTPS Online Web page. Hear about advantages to *e-filers* who pay electronically vs. paying by check. Marketing information will also be provided for practitioners interested in providing education or offering payments as a service to their clients.

### 23. Simplified Tax & Wage Reporting System (STAWRS)

STAWRS is a cooperative effort of federal & state governments, private organizations, and employers. Presenting progress and plans for the Commercial Off The Shelf (COTS), electronic single Point Filing Project and Internet EIN Application Project.

### 24. IRS *e-file* Marketing for Individuals and Businesses

Learn what the IRS is doing to promote IRS *e-file*. From television to radio to print mediums, learn how you too can benefit from our national advertising campaign. In addition discover how the marketing tool kit and market research information can make a difference to your business.

### 25. Support Services for EROs Panel

Hear about the various support services available to you as an Authorized IRS *e-file* Provider. Panel members include representatives from Electronic Tax Administration (ETA), and Stakeholder Partnership Education and Communication (SPEC). Topics will include communications, marketing, and future e-services.

### 26. For The Computer Geek in Each of Us

This seminar will focus on transmitting directly to the IRS. Communication methods and procedures will be discussed as well as any changes for the coming year. This seminar will also explain the processing of a return.

### 27. Emerging Issues in Wage & Investment Compliance

Wage & Investment compliance executives will discuss emerging compliance issues related to W&I customers as a result of the 2000 filing season and current “hot topics.” They will also discuss the actions taken to design and implement “risk-based” collection and examination case selection processes.

### 28. Marketing for the 21st Century (double session)

This popular 2-hour seminar has been updated and brought back for a third year! The session will again focus on marketing/planning, with specific discussions on segmentation of your customers, differentiation of you from your competition and defining your competitive advantage...why customers use your services! Based on feedback from previous forum attendees, this year’s session will include expanded questions and templates around each issue, and include discussion of the significant differences between selling a service and selling a product.

### 29. Protecting Taxpayer Privacy at the IRS

Join us to hear what the IRS is doing to make sure taxpayers’ privacy is protected. Learn what the Privacy Impact Assessment, a nationally recognized best practice, means for your clients and how their information is protected from unlawful disclosure.

### 30. Staying in Step with the IRS

Getting the information you need to avoid common compliance problems.

### 31. ETA Panel Discussion

A panel discussion involving industry representatives and IRS personnel addressing issues important to *e-file*.

### 32. Don’t Make Retirement a “Taxing Event”: Retirement Plan Tax Benefits

Learn how to maximize your usage of retirement plans and minimize risk of noncompliance with complicated pension rules. Navigating the contribution, distribution and filing requirements of retirement plans such as IRAs, SIMPLEs and 401(k)s. Keeping your retirement funds safe from unnecessary taxes and penalties.

### 33. Third Party Authorization Improvements and Benefits for 2002

This briefing will discuss the improvements, changes and consolidation efforts for the overall Third Party Authorization/Power of Attorney process. Briefing items include expansion of the Check Box authorization and Civil Penalty/Specific Issue input to the Centralized Authorization File.

### 34. Director of Practice Operations

An overview of the seven programs run by the DOP, including Circular 230 disciplinary matters, application of enrolled agents status, appeals of rejection of application or suspension from the Electronic Filer Program, power of attorney rules, and continuing professional education matters. The presentation also covers proposed amendments to Circular 230 and various initiatives concerning one’s ability to represent a taxpayer before the IRS.

# Day 1

| Time | Seminar Room #1 | Seminar Room #2 | Seminar Room #3 | Seminar Room #4 |
|---|---|---|---|---|
| 8:00AM-8:50AM | How to Get Help for Your Clients | Interacting with IRS Electronically** † | Staying in Step With the IRS** | Payroll Pointers For Filers of Forms W-2 & W-3 |
| 8:50AM-9:30AM | Break | Break | Break | Break |
| 9:30AM-10:20AM | Exam & Compliance Issues | *e-file* Products for Individuals** | Filing Forms W2 & W-3 | Don't Make Retirement a "Taxing Event:" Retirement Plan Tax Benefits † |
| 10:20AM-10:45AM | Break | Break | Break | Break |
| 10:45AM-11:40AM | Commissioner's Address | Commissioner's Address | Commissioner's Address | Commissioner's Address |
| 11:40AM-1:00PM | Lunch | Lunch | Lunch | Lunch |
| 1:00PM-1:50PM | IR$ Data = More Money, More Information | *e-file* Products for Business ** | EITC Survival Tips | Protecting Taxpayer Privacy at the IRS † |
| 1:50PM-2:00PM | Break | Break | Break | Break |
| 2:00PM-2:50PM | Step Into the Future with *e-file*** | Panel for Electronic Payments for Individuals and Businesses—EFTPS | EITC Panel Discussion | IRS *e-file* Appeals Process |
| 2:50PM-3:30PM | Break | Break | Break | Break |
| 3:30PM-4:20PM | Third Party Authorization Improvements and Benefits for 2002† | *e-file* Marketing for Individuals and Businesses** | Director of Practice Operations | Communicating with the IRS † |
| 4:30PM-5:30PM | Reception | Reception | Reception | Reception |

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

** ***Recommended for beginners*** † ***Indicates a seminar given one time only***

# Day 2

| Time | Seminar Room #1 | Seminar Room #2 | Seminar Room #3 | Seminar Room #4 |
|---|---|---|---|---|
| **8:00AM-8:50AM** | How to Get Help for Your Clients | Support Services for EROs—Panel** | The FIRE System | *e-file* Products for Individuals** |
| **8:50AM-9:30AM** | Break | Break | Break | Break |
| **9:30AM-10:20AM** | Examination and Compliance Issues | e-Services within a 3rd Party Community | Form 1042-S Issues and Answers | *e-file* Products for Businesses** |
| **10:20AM-10:30AM** | Break | Break | Break | Break |
| **10:30AM-11:30AM** | IR$ Data = More Money, More Information | Step Into the Future with *e-file*** | Bothered by "B" Notices and Pesky IRP Penalties? | Panel for Electronic Payments for Individuals and Businesses—EFTPS |
| **11:30AM-1:00PM** | Lunch | Lunch | Lunch | Lunch |
| **1:00PM-1:50PM** | Marketing for the 21st Century | The New Appeals | EITC Survival Tips | *e-file* Marketing for Individuals and Businesses** |
| **1:50PM-2:00PM** | Break | Break | Break | Break |
| **2:00PM-2:50PM** | Marketing for the 21st Century | ETA Panel Discussion† | EITC Panel Discussion | New Lockbox Changes that Tax Professionals Need to Know |
| **2:50PM-3:00PM** | Break | Break | Break | Break |
| **3:00PM-3:50PM** | For the Computer Geek in Each of Us | Navigating the New IRS** | Minimizing and Working *e-file* Reject Codes** | Stay in the Game** |
| **6:00PM** | Awards Dinner | Awards Dinner | Awards Dinner | Awards Dinner |

***The Awards Dinner will be held in a designated area of the hotel. Ask any IRS person for directions.***

# Day 3

| Time | Seminar Room #1 | Seminar Room #2 | Seminar Room #3 | Seminar Room #4 |
|---|---|---|---|---|
| 8:00AM-8:50AM | The IRS *e-file* Appeals Process | The FIRE System | The New Appeals | Director of Practice Operations |
| 9:00AM-9:50AM | Marketing for the 21st Century | Form 1042-S Issues and Answers | Stay in the Game** | |
| 9:50AM-10:10AM | Break | Break | Break | Break |
| 10:10AM-11:00AM | Marketing for the 21st Century | Bothered by "B" Notices and Pesky IRP Penalties? | Simplified Tax & Wage Reporting System (STAWRS)† | |
| 11:00AM-12:00PM | Lunch | Lunch | Lunch | Lunch |
| 12:00PM-12:50PM | For the Computer Geek in Each of Us | New Lockbox Changes that Tax Professionals Need to Know | e-Services within a 3rd Party Community | |
| 1:00PM-1:50PM | Payroll Pointers for Filers of Forms W-2 and W-3 | Navigating the New IRS** | Support Services for EROs—Panel** | |
| 2:00PM-2:50PM | *Filing Forms* W-2 and W-3 | Staying In Step With The IRS** | Minimizing and Working *e-file* Reject Codes** | |

# To Register

Avoid long registration lines by mailing or faxing this form! The basic fee for this year is $55 for the first member of a business or organization, $40 for the second member and $30 for each subsequent member of the business or organization and for spouses. The fee includes all three days of each forum, the reception at the end of the first day, and the awards dinner at the conclusion of the second day.

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 the below information. With fees this low, the cost of administering refunds would be prohibitive, and so ***there will be no refunds.***

Name

Telephone (including area code)

Firm/Affiliation

Address

City State Zip

**MAIL ALL FORMS TO:**

Public Affairs International Inc.
11120 New Hampshire Avenue, Suite 203
Silver Spring, MD 20904

**OR FAX FORM TO:**
(301) 593-9053

**CALL:**
(301) 593-0200

**E-MAIL ADDRESS:**
painternal@aol.com

**TO CHECK YOUR REGISTRATION STATUS, GO TO**
www.paintl.com

**PLEASE INDICATE WHICH FORUM(S) YOU WILL BE ATTENDING BY CIRCLING THE DATE(S) BELOW:**

| City | Dates | | |
|---|---|---|---|
| **Philadelphia, PA** (July 10-12) | July 10 | July 11 | July 12 |
| **Ft. Lauderdale, FL** (July 24-26) | July 24 | July 25 | July 26 |
| **Dallas, TX** (August 14-16) | August 14 | August 15 | August 16 |
| **Atlanta, GA** (August 21-23) | August 21 | August 22 | August 23 |
| **Cleveland, OH** (September 4-6) | Sept. 4 | Sept. 5 | Sept. 6 |
| **Las Vegas, NV** (September 18-20) | Sept. 18 | Sept. 19 | Sept. 20 |

**I AM A:** ☐ Tax Practitioner ☐ ERO ☐ CPA ☐ Enrolled Agent ☐ Tax Attorney ☐ Other

**ALL MAJOR CREDIT CARDS ACCEPTED.**
**PLEASE PROVIDE THE FOLLOWING INFORMATION:**

Card Name

Card Number

Card Expiration Date

Signature

☐ If you intend to attend the banquet on the second day please check this box. Only participants registered 14 days prior to each conference are guaranteed a seat at the banquet.

*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 Sessions

| | | | | |
|---|---|---|---|---|
| **8:00-8:50** | ☐ Seminar Room #1 | ☐ Seminar Room #2 | ☐ Seminar Room #3 | ☐ Seminar Room #4 |
| **9:30-10:20** | ☐ Seminar Room #1 | ☐ Seminar Room #2 | ☐ Seminar Room #3 | ☐ Seminar Room #4 |
| **10:45-11:40** | ☐ Seminar Room #1 | ☐ Seminar Room #2 | ☐ Seminar Room #3 | ☐ Seminar Room #4 |

### Afternoon Sessions

| | | | | |
|---|---|---|---|---|
| **1:00-1:50** | ☐ Seminar Room #1 | ☐ Seminar Room #2 | ☐ Seminar Room #3 | ☐ Seminar Room #4 |
| **2:00-2:50** | ☐ Seminar Room #1 | ☐ Seminar Room #2 | ☐ Seminar Room #3 | ☐ Seminar Room #4 |
| **3:30-4:20** | ☐ Seminar Room #1 | ☐ Seminar Room #2 | ☐ Seminar Room #3 | ☐ Seminar Room #4 |

## Day 2

### Morning Sessions

| | | | | |
|---|---|---|---|---|
| **8:00-8:50** | ☐ Seminar Room #1 | ☐ Seminar Room #2 | ☐ Seminar Room #3 | ☐ Seminar Room #4 |
| **9:30-10:20** | ☐ Seminar Room #1 | ☐ Seminar Room #2 | ☐ Seminar Room #3 | ☐ Seminar Room #4 |
| **10:30-11:30** | ☐ Seminar Room #1 | ☐ Seminar Room #2 | ☐ Seminar Room #3 | ☐ Seminar Room #4 |

### Afternoon Sessions

| | | | | |
|---|---|---|---|---|
| **1:00-1:50** | ☐ Seminar Room #1 | ☐ Seminar Room #2 | ☐ Seminar Room #3 | ☐ Seminar Room #4 |
| **2:00-2:50** | ☐ Seminar Room #1 | ☐ Seminar Room #2 | ☐ Seminar Room #3 | ☐ Seminar Room #4 |
| **3:00-4:50** | ☐ Seminar Room #1 | ☐ Seminar Room #2 | ☐ Seminar Room #3 | ☐ Seminar Room #4 |

## Day 3

### Morning Sessions

| | | | | |
|---|---|---|---|---|
| **8:00-8:50** | ☐ Seminar Room #1 | ☐ Seminar Room #2 | ☐ Seminar Room #3 | ☐ Seminar Room #4 |
| **9:00-9:50** | ☐ Seminar Room #1 | ☐ Seminar Room #2 | ☐ Seminar Room #3 | ☐ Seminar Room #4 |
| **10:10-11:00** | ☐ Seminar Room #1 | ☐ Seminar Room #2 | ☐ Seminar Room #3 | ☐ Seminar Room #4 |

### Afternoon Sessions

| | | | | |
|---|---|---|---|---|
| **12:00-12:50** | ☐ Seminar Room #1 | ☐ Seminar Room #2 | ☐ Seminar Room #3 | ☐ Seminar Room #4 |
| **1:00-1:50** | ☐ Seminar Room #1 | ☐ Seminar Room #2 | ☐ Seminar Room #3 | ☐ Seminar Room #4 |
| **2:00-2:50** | ☐ Seminar Room #1 | ☐ Seminar Room #2 | ☐ Seminar Room #3 | ☐ Seminar Room #4 |

# Special Rates

## Hotels

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

| Forum Location | Hotel Information | Rate |
|---|---|---|
| **Philadelphia, PA** (July 10-12) | Adams Mark Philadelphia<br>City Ave & Monument Rd.<br>Philadelphia, PA 19131<br>(800) 444-2326 | $100.00 |
| **Ft. Lauderdale, FL** (July 24-26) | Wyndham Resort & Spa<br>250 Racquet Club Road<br>Ft. Lauderdale, FL 33326<br>(954) 389-3300 | $72.00 |
| **Dallas, TX** (August 14-16) | Hotel Inter-Continental<br>15201 Dallas Parkway<br>Addison, TX 75001<br>(972) 386-6000 | $94.00 |
| **Atlanta, GA** (August 21-23) | Renaissance Waverly<br>2450 Galleria Parkway<br>Atlanta, GA 30339<br>(770) 953-4500 | $100.00 |
| **Cleveland, OH** (September 4-6) | Renaissance Cleveland<br>24 Public Square<br>Cleveland, OH 44113<br>(800) 468-3571 | $98.00 |
| **Las Vegas, NV** (September 18-20) | Riviera Hotel<br>2901 Las Vegas Blvd. SO.<br>Las Vegas, NV 89109<br>(800) 634-6753 | $78.00 |

## Airlines

| Airline Carrier | Telephone | City | Gold File Number |
|---|---|---|---|
| **U.S. Airways** | (877) 874-7687 | Philadelphia | 84681812 |
| **Southwest** | (800) 433-5368 | Ft. Lauderdale<br>Dallas<br>Cleveland<br>Las Vegas | R 3343<br>S 3343<br>T 3343<br>U 3343 |
| **Delta** | (800) 241-6760 | Atlanta | DMN 172781A |

## Car Rental

| Car Rental Agency | Telephone | Gold File Number |
|---|---|---|
| **Hertz** | (800) 654-2240 | CV#02QT0001 (for all cities) |

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Publication 3326 (Rev. 4-01)
Catalog Number 26976V