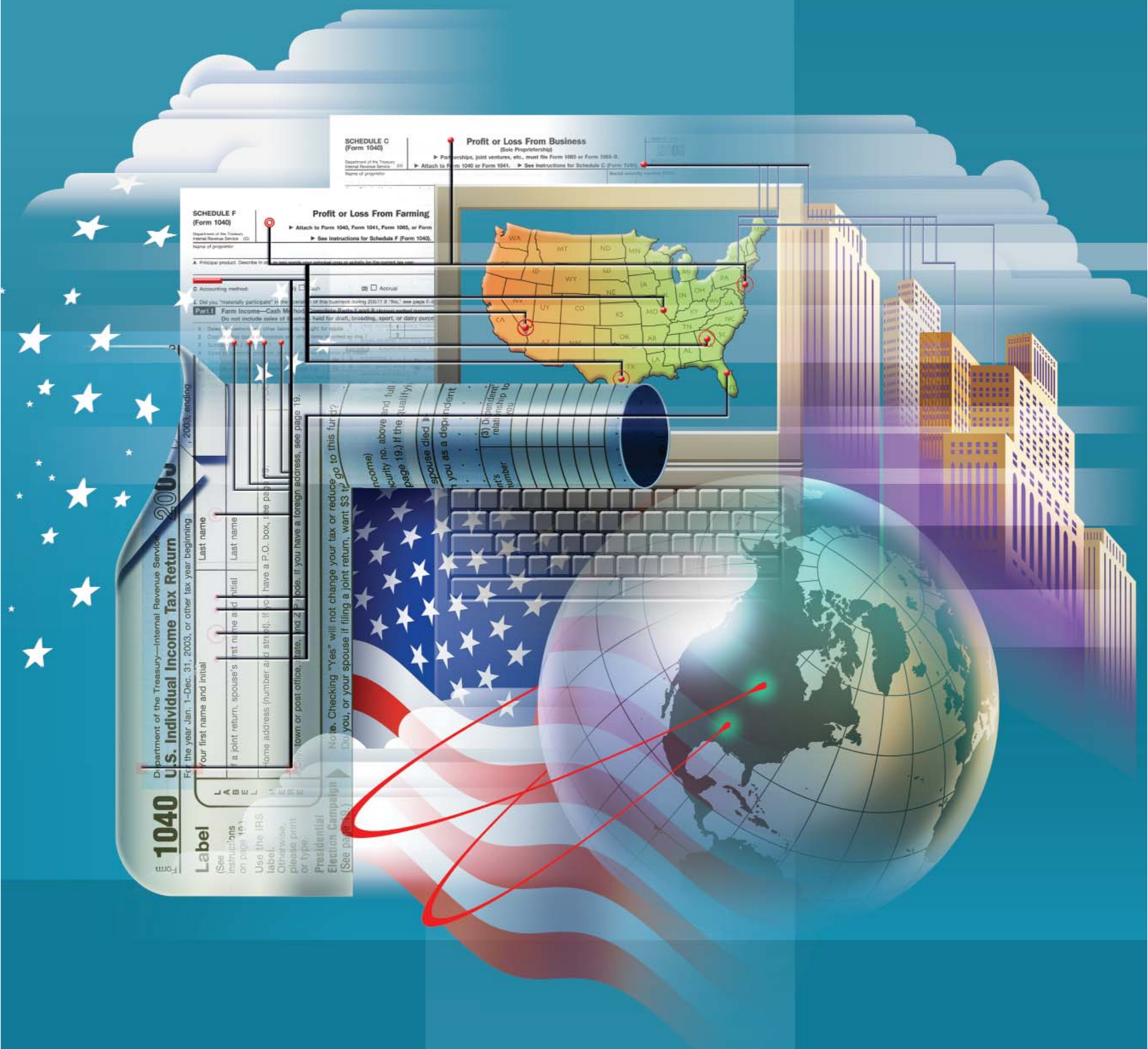
# IRS Nationwide Tax Forums

# 2003

**Registration Booklet**



## Tips to Make Your Forum Experience More Enjoyable:

### REGISTER EARLY!!

*The hotels that host the forums have sold out every year for the past seven years! If you want the convenience of staying in the forum hotel, make your reservation as soon as you get this brochure!*

*Forum Registration — Avoid the long lines, pre-register from 6:00pm to 9:00pm on the Monday evening before the forum begins!*

### ARRIVE EARLY!!

*The seminars are very popular and seating space is at a premium — first come, first served.*

### ATTEND PRACTITIONER CASE RESOLUTION!

*If you have a case to resolve, reserve a time slot in the case resolution room on Monday evening during pre-registration! See page 5 of this brochure for details.*

*Remember to check the box on the registration form if you plan to participate!*

### MEET THE IRS OVERSIGHT BOARD!

*Visit with Oversight Board representatives and offer your comments on various IRS initiatives and programs. Check the IRS Information Booth for more details.*

### BECOME AN ELECTRONIC RETURN ORIGINATOR!

*Visit our Electronic Return Originator (ERO) Sign-up room to discover how you can become an ERO!*

### CHECK THE INFORMATION BOOTH REGULARLY!

*The IRS Information Booth will be located in a prominent place at each forum. The booth will have the latest information concerning program and location changes.*

### ATTEND THE AWARDS DINNER!

*Don't forget to check the box on the registration form to attend the awards dinner.*

*All reservations must be received no later than 14 days before each forum.*

### VISIT THE VENDORS!

*The vendors in the exhibit hall offer a wide variety of products and services that can help you improve your business. Visit them throughout the forum.*

### ELECTRONIC FEDERAL TAX PAYMENT SYSTEM (EFTPS)!

*Visit the EFTPS Registration Booth and see how tax professionals can make their client's tax payments easier while reducing their paperwork!*

# From the Acting Commissioner

It is my pleasure to invite you to attend our 2003 Internal Revenue Service Nationwide Tax Forums. As a member of the tax professional community, you play a critical role in the success of both our tax administration system and our modernization efforts. We've taken great care to improve our agenda to specifically address issues you've communicated are important. As you review the brochure, you will find that we've increased the number of seminars, incorporated more advanced topics and we address more complex issues than ever before.

We have further enhanced our partnership with several of the tax professional associations and you will see an increased level of their participation at this year's tax forums. The National Association of Enrolled Agents, the National Association of Tax Professionals, the National Society of Accountants and the National Society of Tax Professionals will all present seminars and I encourage you to engage in dialogue with representatives from these vital organizations.

I am confident that as you attend the forum seminars, and have the opportunity to interact with the IRS personnel, you will not only learn more about the IRS initiatives, but you will see that we as an organization continue to provide you with top quality customer service. I invite you to bring your toughest case to the Practitioner Case Resolution Room, where we'll demonstrate our high level of commitment to helping you better serve your clients.

We continue our journey to encourage electronic filing and electronic payments as the way to do business. To those of you who have embraced these programs, we thank you. To those of you who would like to learn more about these vital programs, we offer several seminars that will answer your questions. We invite you to learn how you can improve your business and walk with us down the path of electronic filing and electronic payments.

The dedicated men and women of the Internal Revenue Service are committed to providing you with the latest, most complete information available concerning IRS programs, policies and practices. We look forward to spending time with you at this year's tax forums.

Bob Wenzel

***Bob Wenzel***
***Acting Commissioner, Internal Revenue Service***

# Welcome Aboard!

We are very excited about the 2003 IRS Nationwide Tax Forums. We've listened to your suggestions and created an agenda full of new information, additional offerings, more advanced topics and special events we're sure you will enjoy.

As you peruse this brochure, you will notice the traditional *e-file* topics will still be offered, and you'll also see a significant increase in the number of advanced topics. Some of these sessions will be addressing popular issues including abusive tax schemes, tax shelter reporting and compliance, limited issue focused examinations and alternative dispute resolution. We've specifically designed these sessions to address more complex tax law issues. While these topics will be of particular interest to attorneys and CPA's, these seminars are open to every attendee. Another new addition at this year's tax forums will be the inclusion of two workshops, "Applying for Tax-Exempt Status" and "How to Become an Enrolled Agent."

The IRS is also delighted about the continuation of our partnership with the National Association of Enrolled Agents (NAEA), the National Association of Tax Professionals (NATP), the National Society of Accountants (NSA), and the National Society of Tax Professionals (NSTP). These associations have been invited to offer seminars at all the tax forums this year, as well as provide exhibit booths and conduct special events. Additionally, the NSTP will be holding their annual conference in conjunction with the 2003 IRS Nationwide Tax Forum in Las Vegas, NV.


The forums will continue to be a three-day event and we recommend that all participants plan to spend the full three days with us for maximum benefit. There are so many hot topics to offer, we've added a fifth seminar room. The Practitioner Case Resolution Program was extremely popular last year and will be offered at every forum in 2003. You may make your appointment at the Case Resolution table as early as Monday evening during pre-registration. If you would like to participate in the Practitioner Case Resolution Program, please check the designated block on the enclosed registration form.

The awards dinner offered on the second night of the forums is included in the registration fee and will be a highlight of the forums. It is designed to provide an informal setting for the exchange of professional information and ideas, which makes the tax forums so valuable to the tax professional community.

As in previous years, the opportunity exists to interact with IRS executives and other tax professionals, in both a formal and informal setting. Many of the sessions will be presented by our top representatives and we'll also have specialists on hand to answer your technical and procedural questions.

Please review the schedule of seminars carefully. While we traditionally offer most of the seminars twice within the three-day period, some sessions are only offered once.

For those seeking Continuing Professional Education Credits (CPEs), a total of 22 credits may be earned. Tax forum veterans and first-time participants will find all three days interesting, informative and well worth spending with us. These tax forums remain the most inexpensive way to acquire valuable CPE credits anywhere!

## The Seminars

As in previous years, high-level IRS executives will present many seminars. Our goal is to provide participants with the latest "word" directly from the IRS official in charge of the particular area or program under discussion in the particular seminar. We have also included a number of events specifically designed 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, and they are easily identifiable by their white "speaker" ribbons. Please avail yourself of the opportunity to speak informally with them and with the IRS personnel identified by red IRS "staff" ribbons during the course of the forum. In many cases, seating is limited in the seminar rooms, so please plan to arrive a little early to each seminar. (Seats are available on a first-come, first-served basis and are not guaranteed.)

### IRS *e-file* program

**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).**

**Live in Atlantic City . . .**

### Tax Talk Today – "Everything's Electronic"

**Live downlink, July 9, 2:30 p.m. EST**

IRS brings its monthly web cast for tax practitioners ***live*** to the Atlantic City Tax Forum! Join the audience for our program featuring top IRS executives, practitioners, software vendors and others discussing the progress in moving toward an electronic tax practice. In this hour-long broadcast, forum attendees will get a look at the high level strategy for the future of e-submissions in a way that will complement the specific sessions available at each forum. This *Tax Talk Today* program is just as interactive as any other session at the forum so prepare to pose your questions to the *Tax Talk Today* panelists right from your seats in Atlantic City.

**. . . and rebroadcast in Orlando, Atlanta, St. Louis, San Antonio, and Las Vegas . . .**

### Tax Talk Today

**Day 2 and Day 3 Lunch Programs, 12:30 p.m.**

The Nationwide Tax Forums are a great way for tax practitioners to stay in touch with the always changing world of tax law and what's going on at the IRS. But the tax forums happen just once a year! *Tax Talk Today* is your ticket to a virtual tax forum — every month. Bring your lunch and join us for an informative session, highlighting programs you can access right now on the *Tax Talk Today* website. Program topics cover everything from global withholding issues to Schedule K-1 matching to our most recent program, "Everything's Electronic". Make *Tax Talk Today* your year-round way to stay plugged-in to what's new.

## Focus Groups

Many IRS organizations conduct focus group sessions during the tax forums. These sessions provide an excellent mechanism for the IRS to gain valuable feedback from the tax professional community on the needs and expectations of its customers and on ways to improve the delivery of products and services to taxpayers. Participants are randomly selected for voluntary participation in focus groups. If an IRS staff member approaches you about participating in a focus group, please consider it as an excellent opportunity to make your voice heard. Focus group attendance will qualify for CPE credits.

## The Vendors

We invite your attention to the exhibit area where vendors display their products. Many of our vendors are sponsoring special events this year. An information sheet identifying each vendor and their respective location within the exhibit area is contained in the package you will receive at the registration counter. The vendor demonstration room also affords an opportunity to assess our vendors' products in a more focused, "hands-on" atmosphere. Please explore the exhibit hall and take advantage of these opportunities. Opening and closing times for the exhibit hall are indicated in the schedule on page 6 of this brochure.

## Professional Credit

Attendance at these seminars qualifies for Continuing Professional Education (CPE) credits for Enrolled Agents. Other professional groups should consult their prospective licensing agencies regarding qualifying credit. Each seminar qualifies for one CPE credit. Due to the concurrence of seminars, the maximum number of CPE credits available is 22 for each forum location. A CPE Credit Form is provided in the registration packet. The completed top copy should be provided to the IRS Information Booth after your last seminar. The bottom copy of the CPE Credit Form will serve as your certificate of attendance. **It is the responsibility of the attendee to understand and comply with their state licensing agency's CPE requirements. It is also the responsibility of the attendee to coordinate the reporting of credits earned at the Nationwide Tax Forums with their state licensing agency**. There are no prerequisites for attending any of these seminars. No advanced preparation is required, and content levels range from beginning level to advanced level. The delivery method is via live instructor. The field of study for all seminars is taxation.

*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, (615) 880-4200.*

For attorneys in attendance, your state board may accept Continuing Legal Education (CLE) credits. Contact your state board to determine if they will accept these seminars for credit. For CLE reporting purposes, each seminar is 50 minutes long.

### EFTPS 2003
### IRS Nationwide Tax Forums

**EFTPS...The Easy Way to Pay Federal Taxes Electronically**

**EFTPS-Electronic Federal Tax Payment System is the easiest way for tax professionals to make tax payments for their clients—and reduce the paperwork.**

**Learn what's new this year with the most popular system for paying taxes: enhancements to the Internet feature of EFTPS, expedited enrollment, plans for enhanced software, reduced penalties, and more. Visit the EFTPS Registration Booth…make sure to bring your Taxpayer Identification Number (EIN or SSN) with you.**

## Registration Fee

The basic fee for this year's tax forums is **$80** for the first member of a business or organization, **$70** for the second attendee from the same business or organization, and **$60** for all subsequent members of the same business or organization and for spouses. Included in the fee are the reception on the evening of the first day and the awards dinner on the evening of the second day. Individual vendors participating in the forums may sponsor other food events, such as breakfast, coffee, and the ice cream social. The admission fee remains modest and covers the administrative costs accrued by the management firm hired to perform logistics and other services. With fees this low, the cost of administering refunds would be prohibitive. As a result, **the registration fee is non-refundable**.

Details concerning the admission fee and person-specific application can be obtained by calling Public Affairs International at 301-593-0200.

## Awards Dinner

Please plan on joining us for an evening of fun and entertainment on Wednesday night at the IRS Awards Banquet. This is where the IRS will honor several tax professionals with awards in recognition of their performance, accomplishments, and contributions to the IRS *e-file* Program.

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 features a guest speaker, and honors various members of the tax professional community.

Because of the prior planning required for this event, we ask that you please register to attend 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**.

## Practitioner Case Resolution At The Forums

**As part of IRS' continuing effort to provide top quality service to taxpayers and their representatives, all of the 2003 tax forums will include the "Practitioner Case Resolution" Program. This program provides an opportunity to resolve client issues through IRS' Everyday Tax Solutions assistance and the Taxpayer Advocate Service. Authorized taxpayer representatives are invited to bring their toughest IRS case (one case per person), 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 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. We will also provide assistance in resolving one of your Earned Income Tax Credit (EITC) cases as well.**

**A signed original or copy of your Power of Attorney (Form 2848) is required to authorize IRS disclosure of confidential tax information. To participate, please check the case resolution program box on the registration form and visit the IRS Information Booth to schedule your appointment upon arrival at the forum.**

# Schedule

## Day 1

| | |
|---|---|
| 7:00AM | Registration Begins |
| 8:00AM - 5:00PM | Case Resolution Room |
| 8:00AM - 12:10PM | Seminars |
| 8:00AM - 4:00PM | ERO & EFTPS Sign Up |
| 8:00AM - 6:00PM | Exhibit Hall Open |
| 11:20AM - 12:10PM | Commissioner's Address |
| 12:10PM - 1:30PM | Lunch |
| 1:30PM - 5:00PM | Seminars |
| 5:00PM - 6:00PM | Welcome Reception in Exhibit Hall |

## Day 2

| | |
|---|---|
| 7:00AM | Registration Begins |
| 8:00AM - 5:00PM | Case Resolution Room |
| 8:00AM - 12:10PM | Seminars |
| 8:00AM - 4:20PM | ERO & EFTPS Sign Up |
| 8:00AM - 3:00PM | Exhibit Hall Open |
| 12:10PM - 1:30PM | Lunch |
| 1:30PM - 5:20PM | Seminars |
| 6:30PM | Awards Dinner |

## Day 3

| | |
|---|---|
| 7:00AM | Registration Begins |
| 8:00AM - 12:00PM | Case Resolution Room |
| 8:00AM - 11:50AM | Seminars |
| 8:00AM - 3:00PM | ERO & EFTPS Sign Up |
| 11:50AM - 1:00PM | Lunch |
| 1:00PM - 3:50PM | Seminars |



# Seminar Topics

DAY 3 8:00 a.m. Only

### 1. Abusive Schemes: Parallel Civil and Criminal Approach (Advanced)

Join us for a panel discussion on civil and criminal enforcement efforts and your professional responsibilities. Learn more about IRS efforts regarding civil injunctions, voluntary disclosure, promoter schemes and other abusive tax avoidance transaction initiatives.

### 2. Account-Related Products and Services Update

Attend this session to learn about IRS' tax account management services. Topics will include: the new Toll-Free Numbers and when they should be used; the Practitioner Priority Services (PPS); processing Powers of Attorney (CAF); obtaining Employer Identification Numbers (EINs); and information on new services, such as Electronic Accounts Research (EAR), Disclosure Authorizations and other future initiatives.

### 3. Advocacy in Action: Referral, Responsiveness and Related Issues

Learn who to call and what is required to get assistance from the Taxpayer Advocate Service in resolving problems with the IRS. Discover the vital role you play to get help for your clients. Hear how the Taxpayer Advocate Service is working to fix systemic problems and reduce taxpayer burden through administrative recommendations and legislative proposals.

DAY 3 1:00 p.m. Only

### 4. Alternative Dispute Resolution Options at the IRS (Advanced)

This session will focus on the Alternative Dispute Resolution (ADR) options available to taxpayers—Fast Track Mediation, Fast Track Settlement, Post-Appeals Mediation, and Arbitration. It will include a discussion of how these Appeals tools play a role in the tax shelter strategy.

DAY 1 1:30 p.m. Only

### 5. Applying for Tax-Exempt Status (Advanced)

This three-hour workshop, presented by IRS Exempt Organizations specialists, will walk you step-by-step through the nuances of obtaining tax-exempt status for an organization. Emphasis will be on creating organizational documents that satisfy IRS requirements and filing Forms 1023 and 1024. NOTE: This will be a continuous hands-on workshop, with breaks to be determined by the instructor. **Sign up is required at the IRS Information Booth and space is limited to 75 people.**

DAY 1
9:00 a.m.
Only

## 6. Basis Determinations (Advanced)

This program will look at Basis, both equity and debt for the various entity types. We will review what affects Basis increasing and decreasing. We will compare entities to see how the same event can make an extensive difference based on what entity you are. We will include not only what happens inside the company, but how events outside the company affect equity and debt Basis. Presented by the National Association of Tax Professionals.

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

Don't get uptight when you receive a Notice CP2100 ("B" Notice) or Notice 972CG (IRP Penalty) 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. Breaking Down Barriers at the IRS – Meeting Customer Language Needs

As the nation becomes more diverse, so do our customers. While we provide information on IRS' latest multilingual products and services, you will be able to preview and evaluate our efforts as well as provide information on customer language needs.

## 9. Communicating with the IRS

Learn about return and payment processing, notices and correspondence and the "how to's" for resolving controversies at the earliest level. Includes information on Form 911 Problem Resolution, Taxpayer Bill of Rights, IRS restructuring and the role of the Taxpayer Advocate. Presented by the National Association of Enrolled Agents.

## 10. Compliance Initiatives (Advanced)

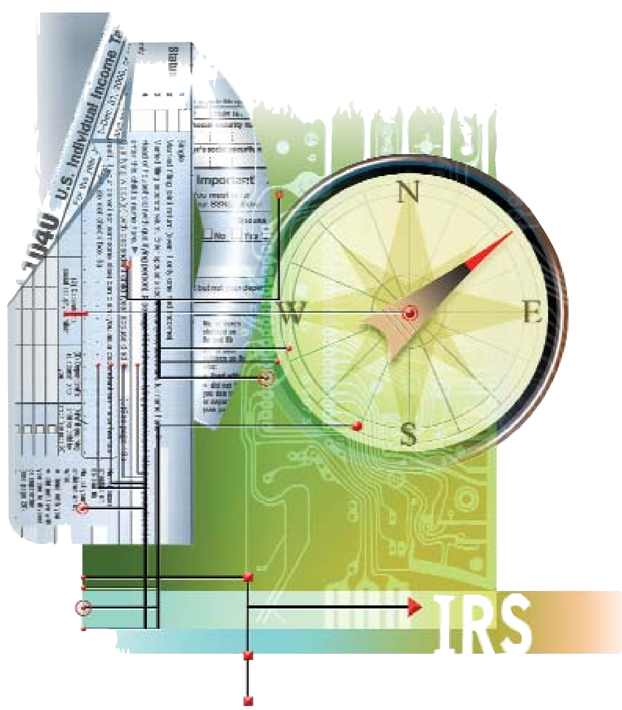
This session will provide an overview of Compliance priority initiatives for FY03 & FY04. Attend this session to learn about the IRS focus on offshore credit card users; high-risk, high-income taxpayers; abusive schemes and promoter investigations; high-income non-filers; unreported income; and the National Research Program.

## 11. Compliance Issues

Join us for an informative tour of the Wage and Investment Compliance Centers and their affiliated call centers. Learn the inner workings and latest updates for correspondence examinations, automated underreported, EITC audits and collection accounts processing. Learn the tricks of navigating through correspondence and telephone contacts with the IRS.

## 12. Deliver Remarkable Customer Service (Advanced)

SIMON SAYS taking C.A.R.E. of business emphasizes accountability for you and your employees. To develop remarkable customer service skills, you have to be Connected, Attentive, Responsible, Enthusiastic (C.A.R.E.). Skip Ulmer will tell you how using video and lecture.



DAY 3 11:00 a.m. Only

### 13. Do's and Don'ts for Churches and Religious Organizations (Advanced)

This seminar will provide a broad overview of how churches and religious organizations are recognized as tax-exempt and what responsibilities may accompany this status.

### 14. *e-file* for Form 1040

Join us for the latest news about IRS *e-file* programs and products for individual returns. We'll discuss programs available now and what you can expect for the upcoming filing season, including enhancements to programs and what new forms you will be able to file electronically.

### 15. EFTPS

Learn how the Electronic Federal Tax Payment System (EFTPS) can help you solve tax-paying problems with your clients. Learn about the easy ways Treasury can help you market EFTPS to build stronger client relationships.

### 16. EITC Hot Topics

Slip into this session to hear IRS representatives discuss significant issues that have an impact on EITC. You'll also learn about changes for 2003 and the latest on new educational outreach programs and compliance initiatives.

### 17. EITC Tool Kit

Everything you ever needed to know about helping your clients claim EITC. This is a must-attend session for new or relatively inexperienced preparers. You'll learn the basics on EITC requirements, including due diligence responsibilities.

DAY 3 8:00 a.m. Only

### 18. Ethics and Professional Responsibility (Part I) (Advanced)

Increasingly, public and private attention is focused on ethics and professional conduct. Some states now require ethics training as part of their mandatory CPE. Additionally, Circular 230 now contains a future requirement that will mandate annual ethics training for all enrolled agents. This two-part seminar will review many of the important ethical issues, rules and procedures facing tax professionals. Presented by the National Society of Tax Professionals.

DAY 3 10:00 a.m. Only

### 19. Ethics and Professional Responsibility (Part II) (Advanced)

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

This session provides a detailed demonstration on how to use the Social Security Administration's (SSA) secure, free, and easy way to file Forms W-2/W-3 electronically. Whether you have one employee or thousands, SSA's new Internet-based Business Services Online has a simple filing option to fit your needs.

### 21. Get Ready to *e-file*

Learn how to become an Authorized *e-file* Provider from the application process through *e-filing* the first return.

DAY 2 4:30 p.m. Only

### 22. How to Become an Enrolled Agent

Aspiring to become an Enrolled Agent? Find out what you need to prepare for the Special Enrollment Exam (SEE). This course offers study tips and trends to better prepare you for this challenging exam. Learn the history behind the enrolled agent profession and current practice trends. See what it takes to become an enrolled agent from EA's who have taken the Special Enrollment Exam. Presented by the National Association of Enrolled Agents.

DAY 2 1:30 p.m. Only

### 23. Introduction to Exempt Organizations (Advanced)

Whether it's a booster club, church group or sports league, if you work with tax-exempt organizations, you need to attend this seminar! Topics will include how to apply for tax-exemption, filing requirements and the Exempt Organizations *e-file* Program.

## 24. IRS.gov – The Latest and Greatest

How can you find out about the latest developments at IRS? Let's talk WEB! Come hear about the newest innovations on the IRS' web site, IRS.gov. You'll learn how e-services can assist you with your interactions with IRS and your clients. (You'll also have an opportunity to tell us what you think about IRS.gov and what you'd like to see in the future.)

DAY 3
11:00 a.m.
Only

## 25. Limited Issue Focused Examinations (Advanced)

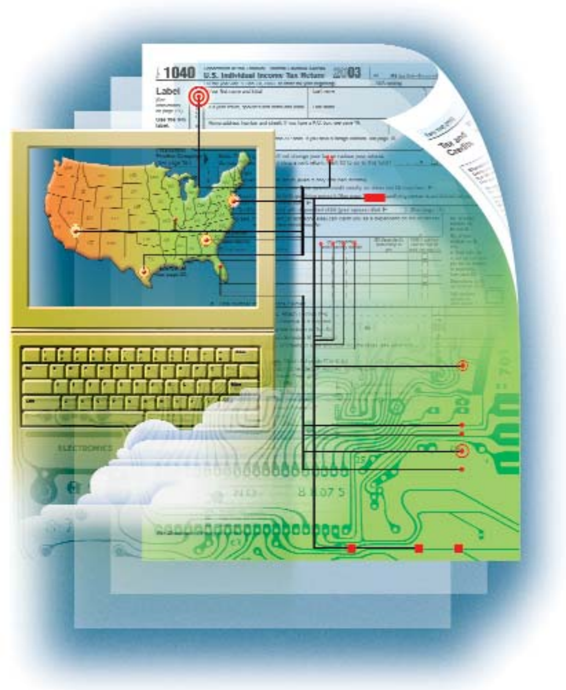
This session will focus on the Limited Issue Focused Examination (LIFE). LIFE is an alternative to our traditional broad-based examination process. Learn how agents use risk analysis and materiality considerations to limit their examinations to the critical issues. We'll explain how this allows the IRS and the taxpayer to enter into an agreement covering key aspects of the examination and require them to share in the responsibility for timely completion.

## 26. Making the Transition from Paper to *e-file* for Tax Accounting Professionals

A panel of tax practitioners from professional accounting firms will share personal experiences in their transition from paper to *e-file*. Learn the challenges and rewards of choosing *e-file* as a way to do business.

## 27. Modernized *e-file* has Arrived (Advanced)

Modernized *e-file* means new convenience, efficiency and more satisfied clients. Join us to discover the newest features, benefits and capabilities of Modernized *e-file* and what it means to taxpayers, practitioners and software developers. You'll learn about the newest technology for 2003, including our new flexible format and the new practitioner model for *e-filing* employment taxes. We'll also give you a peek at the enhancements available in 2004 as business Forms 1120, 1120S, and 990 are added.




## 28. "No Fuss" Retirement Plans (Advanced)

There are easy, low-cost retirement plan options for small-business employers. Employers and their employees can use these plans to provide financial security for their retirement years. This seminar will explore the latest on establishing and operating "no fuss" retirement plans and correcting common problems.

## 29. Not Your Same Old Form 1042-S

Confused by the new rules and procedures for filing nonresident alien information returns? Come to this session to hear about common filing errors the IRS has identified and how you can reduce those errors. Learn about the latest enhancements to the IRS program. Bring your questions – plenty of time will be allotted to answer them.

## 30. Offer-in-Compromise

Learn about the latest changes to the Offer-in-Compromise (OIC) program and the most recently issued guidance that can help your clients. Learn which taxpayers are eligible for offers, which are not and how to correctly submit an OIC.

### 31. Office of Professional Responsibility—Who We Are And What We Do

What makes the Office of Professional Responsibility (OPR) different from its predecessor, the Office of Director of Practice? How do you become an enrolled agent and what do you need to know about the enrollment exam? What are we doing to combat misconduct in IRS practice and what are the most common types of misconduct? What types of continuing professional education do enrolled agents need and what are OPR's plans for improving our programs? Attend this session for the answers to these questions and more!

### 32. Overview of 2003 Income Tax Law Changes

Learn about the latest significant income tax law changes and related new and revised tax forms and publications for the 2003 tax year.

### 33. Payroll Pointers for Filers of Forms W-2/W-3

This session will provide attendees with all they need to know to file Forms W-2/W-3 with the Social Security Administration and how to avoid common reporting errors.

### 34. Processing Issues and Electronic Solutions

Attend this session to learn about IRS initiatives for processing business tax returns and payments. This session talks about errors commonly found on paper submissions and offers electronic solutions to those problems. Learn what is on the horizon for handling electronic return submissions and payments in the future.

### 35. Processing Your Client's Tax Returns – Paper and Electronic

Have you ever been curious about what happens to a 1040 return once it arrives at an IRS processing center? Here's your opportunity for a virtual tour of returns processing with an emphasis on our information technology. You'll learn all the latest changes to mailing addresses and important tips on how to avoid common errors.

### 36. Protecting the Integrity of Our Tax System

As a tax professional, you play a vital role in assisting the Treasury Inspector General for Tax Administration (TIGTA) in safeguarding America's federal tax system. Attend the TIGTA Office of Investigations' presentation to enhance your understanding of the organization and learn about the variety of investigations that highlight the unique ways TIGTA works to protect our nation's tax system.

### 37. Protecting Privacy: Principles & Practices at the IRS

Join us to hear what the IRS is doing to ensure every taxpayer's privacy is protected. Learn what the Privacy Impact Assessment and the IRS web privacy policies mean for your clients and how we protect their information from unlawful disclosure.

### 38. Reasonable Cause: Penalty Avoidance and Abatement

Learn about the twin A's – Avoidance and Abatement. This session provides an in-depth look into the world of penalty avoidance, abatement and recovery. Become a hero to your clients as you discover the mechanics of avoiding penalties in cases of late returns, how to get penalties abated and ways to recover penalty amounts. Presented by the National Society of Accountants.

### 39. Refund Crimes

Learn about some of today's most prevalent tax schemes as they relate to refund crimes, how to identify potential scams and how to avoid them. Gain insight into what IRS' Criminal Investigation Division is doing to identify offenders and prosecute them.

### 40. Reporting Flow-Through Items (Advanced)

Learn how to properly complete Schedule K-1 (of Forms 1065 & 1120S), and Schedules B & E (of Form 1040) for reporting flow-through items. Learn about additional enhancements the IRS is planning for improving reporting of flow-through items.

## 41. Safeguarding IRS *e-file*

Everything you need to know to safeguard the IRS *e-file* Program and ensure you are meeting the requirements of the program.

## 42. Support Services for Authorized IRS *e-file* Providers (Advanced)

Learn about various support services available to you as an IRS *e-file* Provider. The panel will include IRS representatives addressing the *e-file* Help Desk, marketing and communication of *e-file*, including the newest service called QuickAlerts messaging, the Marketing Took Kit and more.

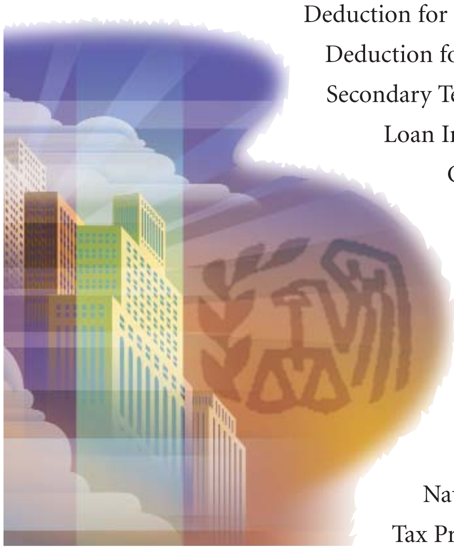
DAY 3 9:00 a.m. Only

## 43. Tax Shelter Reporting and Compliance (Advanced)

This seminar will provide an overview of the reporting requirements for promoter registration, promoter list maintenance and investor disclosure, including a discussion of the new registration and disclosure regulations.  We'll also discuss current field compliance activities and IRS resolution options for investors.

## 44. The Education Menu: Choices, Choices and More Choices (Advanced)

This seminar will review the significant tax code changes affecting the education tax incentives, including the HOPE Scholarship Credit, Lifetime Learning Credit, Coverdell Education Savings Account, Employer Support for Education, Deduction for Tuition and Fees, Deduction for Elementary & Secondary Teachers, Student Loan Interest Deduction, College Savings Plan, Prepaid Tuition Plans and Withdrawing from IRAs for Education. Presented by the National Society of Tax Professionals.



## 45. 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, W-2G, 8027, and Questionable W-4 using the **FIRE** (Filing Information Returns Electronically) System. This session will cover the advantages and specifications designed exclusively for filing information returns electronically, instructions for new filers, common problems associated with electronic filing and a LIVE demo of the FIRE System.

## 46. The Red, White & Blue of Tax Credits (Advanced)

When your clients come to you, they expect you to know what credits are available and how to apply for them. Take a patriotic walk through the maze of tax credits available to the American taxpayer. Learn about business, child, and education tax credits and other credit incentives that can benefit your clients on a business and/or personal level. Presented by the National Society of Accountants.

## 47. What Do I Do if I Don't Think the IRS is Right?

This session will focus on a taxpayer's right to appeal certain IRS compliance actions, including proposed income tax adjustments, Collection Due Process hearings, denials of penalty abatements, rejection of an offer-in-compromise, and the Collection Appeals Program. Learn how a taxpayer appeals the issue, what the Appeals Division considers, and what it expects of taxpayers requesting the appeal.

## 48. What Does it Take to Create a Team? (Advanced)

SIMON SAYS energize your organization to go beyond team building and create a skilled, focused, high-energy team that is ready to achieve. Using video and lecture, Skip Ulmer will lead you through the Ann Bancroft team, the first all-woman team to reach the South Pole on skis, and discuss how to come together as a team, learn as a team, and take action as a team.

# Day 1

| Time | Seminar Room 1 | Seminar Room 2 | Seminar Room 3 | Seminar Room 4 | Seminar Room 5 |
|---|---|---|---|---|---|
| **8:00 am – 8:50 am** | Compliance Issues | The Education Menu: Choices, Choices and More Choices ** | Processing Issues and Electronic Solutions | Get Ready to *e-file* | The FIRE System |
| | Break | Break | Break | Break | Break |
| **9:00 am – 9:50 am** | Support Services for Authorized IRS *e-file* Providers ** | Basis Determinations**+ | Account-Related Products and Services Update | Filing Forms W-2/W-3 Electronically with the Social Security Administration | Not Your Same Old Form 1042-S |
| | Break | Break | Break | Break | Break |
| **10:00 am – 10:50 am** | Advocacy in Action: Referral and Related Issues | The Red, White, & Blue of Tax Credits ** | EFTPS | Safeguarding IRS *e-file* | Payroll Pointers for Filers of Forms W-2/W-3 |
| | Break | Break | Break | Break | Break |
| **11:20 am – 12:10 pm** | Commissioner's Address | Commissioner's Address | Commissioner's Address | Commissioner's Address | Commissioner's Address |
| **12:10 pm – 1:30 pm** | Lunch | Lunch | Lunch | Lunch | Lunch |
| **1:30 pm – 2:20 pm** | Modernized *e-file* has Arrived ** | Communicating with the IRS | EITC Hot Topics | *e-file* for Form 1040 | Applying for Tax Exempt Status **+ |
| | Break | Break | Break | Break | Break |
| **2:30 pm – 3:20 pm** | Offer-in-Compromise | Reasonable Cause: Penalty Avoidance and Abatement | IRS.gov–The Latest and Greatest | Processing Your Client's Tax Returns – Paper and Electronic | Applying for Tax Exempt Status *(continued)* **+ |
| | Break | Break | Break | Break | Break |
| **4:10 pm – 5:00 pm** | Overview of 2003 Income Tax Law Changes | Compliance Initiatives ** | Making the Transition from Paper to *e-file* for Tax Accounting Professionals | Bothered by "B" Notices and Pesky IRP Penalties? | Applying for Tax Exempt Status *(continued)* **+ |
| **5:00 pm – 6:00 pm** | Welcome Reception | Welcome Reception | Welcome Reception | Welcome Reception | Welcome Reception |

** Advanced + Indicates a seminar given only one time

# Day 2

| Time | Seminar Room 1 | Seminar Room 2 | Seminar Room 3 | Seminar Room 4 | Seminar Room 5 |
|---|---|---|---|---|---|
| **8:00 am – 8:50 am** | Overview of 2003 Income Tax Law Changes | The Red, White & Blue of Tax Credits ** | EITC Hot Topics | Get Ready to *e-file* | Reporting Flow–Through Items ** |
| | Break | Break | Break | Break | Break |
| **9:00 am – 9:50 am** | Support Services for Authorized IRS *e-file* Providers ** | Communicating with the IRS | Advocacy in Action: Referral, Responsiveness and Related Issues | EFTPS | Bothered by "B" Notices and Pesky IRP Penalties? |
| | Break | Break | Break | Break | Break |
| **10:00 am – 10:50 am** | "No Fuss" Retirement Plans ** | Reasonable Cause: Penalty Avoidance and Abatement | Processing Issues and Electronic Solutions | What Do I Do if I Don't Think the IRS is Right? | Payroll Pointers for Filers of Forms W-2/W-3 |
| | Break | Break | Break | Break | Break |
| **11:20 am – 12:10 pm** | Compliance Issues | Refund Crimes | EITC Tool Kit | Safeguarding IRS *e-file* | Filing Forms W-2/W-3 Electronically with the Social Security Administration |
| **12:10 pm – 1:30 pm** | Lunch | Lunch | Lunch | Lunch | Lunch |
| **1:30 pm – 2:20 pm** | Offer-in-Compromise | Introduction to Exempt Organizations **+ | Account-Related Products and Services Update | *e-file* for Form 1040 | Not Your Same Old Form 1042-S |
| | Break | Break | Break | Break | Break |
| **2:30 pm – 3:20 pm** | What does it Take to Create a Team?** | Breaking Down Barriers at the IRS–Meeting Customer Language Needs | IRS.gov–The Latest and Greatest | Processing Your Client's Tax Returns – Paper and Electronic | The FIRE System |
| | Break | Break | Break | Break | Break |
| **3:30 pm – 4:20 pm** | Deliver Remarkable Customer Service ** | Making the Transition from Paper to *e-file* for Tax Accounting Professionals | Office of Professional Responsibility–Who We Are and What We Do | Protecting the Integrity of Our Tax System | Protecting Privacy: Principles & Practices at the IRS |
| **4:30 pm – 5:20 pm** | | | The Education Menu: Choices, Choices and More Choices ** | How to Become an Enrolled Agent + | |
| **6:30 pm –** | Awards Dinner | Awards Dinner | Awards Dinner | Awards Dinner | Awards Dinner |

** Advanced  + Indicates a seminar given only one time

# Day 3

| Time | Seminar Room 1 | Seminar Room 2 | Seminar Room 3 | Seminar Room 4 | Seminar Room 5 |
|---|---|---|---|---|---|
| **8:00 am – 8:50 am** | Ethics and Professional Responsibility (I) ** + | Abusive Schemes: Parallel Civil and Criminal Approach ** + | “No Fuss” Retirement Plans ** | | |
| | Break | Break | Break | Break | Break |
| **9:00 am – 9:50 am** | Deliver Remarkable Customer Service** | Tax Shelter Reporting and Compliance **+ | EITC Tool Kit | | |
| | Break | Break | Break | Break | Break |
| **10:00 am – 10:50 am** | Ethics and Professional Responsibility (II)** + | Refund Crimes | Compliance Initiatives ** | | |
| | Break | Break | Break | Break | Break |
| **11:00 am – 11:50 am** | What Does it Take to Create a Team?** | Limited Issue Focused Examinations** + | Do’s and Don’ts for Churches and Religious Organizations **+ | | |
| **11:50 am – 1:00 pm** | Lunch | Lunch | Lunch | Lunch | Lunch |
| **1:00 pm – 1:50 pm** | Office of Professional Responsibility – Who We Are and What We Do | Alternative Dispute Resolution Options at the IRS ** + | Protecting Privacy: Principals & Practices at the IRS | | |
| | Break | Break | Break | Break | Break |
| **2:00 pm – 2:50 pm** | Protecting the Integrity of Our Tax System | Modernized *e-file* has Arrived ** | Reporting Flow – Through Items ** | | |
| | Break | Break | Break | Break | Break |
| **3:00 pm – 3:50 pm** | Breaking Down Barriers at the IRS–Meeting Customer Language Needs | What Do I Do if I Don’t Think IRS is Right? | | | |

** Advanced + Indicates a seminar given only one time

# To Register

Avoid long registration lines by mailing or faxing this form or register online at www.paintl.com! The basic fee for this year is $80 for the first member of a business or organization, $70 for the second member and $60 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 information below. With fees this low, the cost of administering refunds would be prohibitive. As a result, **the registration fee is non-refundable**. Seating is on a first-come, first-served basis and is not guaranteed.

Name (please print or type)

Firm/Affiliation

Telephone (including area code) e-mail Address

Street Address

City State Zip

### Privacy Act Notification

We are requesting this information under 5 USC 301 and 26 USC 7801. The information is being requested in order to establish a record of participants registered. We also need the information to be able to contact you to inform you of future IRS initiatives, to provide information we believe you will be interested in, and to ask questions that help us evaluate our programs. Providing the information is voluntary. Not providing the information will prevent us from contacting you. The information may be disclosed in accordance with routine uses published in the December 10, 2001 Federal Register (Volume 66, Number 237)] for IRS systems of records 22.062, Electronic Filing Records, and 10.004 Stakeholder Relationship Management and Subject Files.

### Privacy Act Disclosure Authorization

*I authorize the release of the information on this form to a contractor so that I may be contacted for my insight and/or recommendations for improvement of IRS programs and policies, and for marketing of IRS programs. The contractor will not be allowed to redisclose information I provide except when necessary to perform the contract for IRS.*

*Signature* ______________________ *Date* __________

### Mail All Forms To:

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### Please indicate which forum(s) you will be attending by circling the date(s) below:

| City | Dates | | |
|---|---|---|---|
| **Atlantic City, NJ** (July 8-10) | July 8 | July 9 | July 10 |
| **Orlando, FL** (July 22-24) | July 22 | July 23 | July 24 |
| **Atlanta, GA** (August 5-7) | August 5 | August 6 | August 7 |
| **St. Louis, MO** (August 19-21) | August 19 | August 20 | August 21 |
| **San Antonio, TX** (September 2-4) | Sept. 2 | Sept. 3 | Sept. 4 |
| **Las Vegas, NV** (September 16-18) | Sept. 16 | Sept. 17 | Sept. 18 |

### Practitioner Case Resolution Program at the Forums

☐ Check this box if you plan to participate in the Practitioner Case Resolution Program. (One case only, please.) Note: Participation is by appointment only. You may sign up at the Case Resolution table beginning Monday evening in the pre-registration area.

### All major credit cards accepted. Please provide the following information:

☐ AMEX ☐ VISA ☐ MASTERCARD

Name on Card (please print or type)

Card Number

Card Expiration Date

Signature

☐ If you plan to attend the awards dinner 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 am – 8:50 am** | ☐ Compliance Issues | ☐ Education Menu | ☐ Processing Issues | ☐ Get Ready to *e-file* | ☐ The FIRE System |
| **9:00 am – 9:50 am** | ☐ Support Services | ☐ Basis Determinations | ☐ Account-Related Prod. | ☐ Filing W-2/W-3 | ☐ Not Your Same 1042-S |
| **10:00 am – 10:50 am** | ☐ Advocacy in Action | ☐ Tax Credits | ☐ EFTPS | ☐ Safeguarding IRS *e-file* | ☐ Payroll Pointers |

### Afternoon Sessions

| | | | | | |
|---|---|---|---|---|---|
| **1:30 pm – 2:20 pm** | ☐ Modernized *e-file* | ☐ Comm. w/IRS | ☐ EITC Hot Topics | ☐ e-file for Form 1040 | ☐ Applying for Tax Exempt |
| **2:30 pm – 3:20 pm** | ☐ OIC | ☐ Reasonable Cause | ☐ IRS.gov–Latest/Greatest | ☐ Proc. Client's Returns | ☐ Applying for Tax Exempt *(continued)* |
| **4:10 pm – 5:00 pm** | ☐ Tax Law Changes | ☐ Compliance Initiatives | ☐ Paper to *e-file* | ☐ "B" Notices/IRP Penalties | ☐ Applying for Tax Exempt *(continued)* |

## DAY 2

### Morning Sessions

| | | | | | |
|---|---|---|---|---|---|
| **8:00 am – 8:50 am** | ☐ Tax Law Changes | ☐ Tax Credits | ☐ EITC Hot Topics | ☐ Get Ready to *e-file* | ☐ Flow-Through Items |
| **9:00 am – 9:50 am** | ☐ Support Services | ☐ Comm. w/IRS | ☐ Advocacy in Action | ☐ EFTPS | ☐ "B" Notices/IPR Penalties |
| **10:00 am – 10:50 am** | ☐ "No Fuss" Retirement | ☐ Reasonable Cause | ☐ Processing Issues | ☐ What Do I Do? | ☐ Payroll Pointers |
| **11:20 am – 12:10 pm** | ☐ Compliance Issues | ☐ Refund Crimes | ☐ EITC Tool Kit | ☐ Safeguarding IRS *e-file* | ☐ Filing W-2/W-3 |

### Afternoon Sessions

| | | | | | |
|---|---|---|---|---|---|
| **1:30 pm – 2:20 pm** | ☐ OIC | ☐ Intro to Exempt Org. | ☐ Account-Related Prod. | ☐ *e-file* for Form 1040 | ☐ Not Your Same 1040-S |
| **2:30 pm – 3:20 pm** | ☐ Create a Team | ☐ Breaking Down Barriers | ☐ IRS.gov-Latest/Greatest | ☐ Proc. Client's Returns | ☐ The FIRE System |
| **3:30 pm – 4:20 pm** | ☐ Deliver Cust. Serv. | ☐ Paper to *e-file* | ☐ Office of Prof. Resp. | ☐ Protecting the Integrity | ☐ Protecting Privacy |
| **4:30 pm – 5:20 pm** | | | ☐ Education Menu | ☐ How to Become an EA | |

## DAY 3

### Morning Sessions

| | | | |
|---|---|---|---|
| **8:00 AM – 8:50 AM** | ☐ Ethics (I) | ☐ Abusive Schemes | ☐ "No Fuss" Retirement |
| **9:00 AM – 9:50 AM** | ☐ Deliver Cust. Serv. | ☐ Tax Shelter Reporting | ☐ EITC Tool Kit |
| **10:00 AM – 10:50 AM** | ☐ Ethics (II) | ☐ Refund Crimes | ☐ Compliance Initiatives |
| **11:00 AM – 11:50 AM** | ☐ Create a Team | ☐ Limited Issue Exams | ☐ Do's and Don'ts for Churches |

### Afternoon Sessions

| | | | |
|---|---|---|---|
| **1:00 PM – 1:50 PM** | ☐ Office of Prof. Resp. | ☐ Alternative Dispute Res. | ☐ Protecting Privacy |
| **2:00 PM – 2:50 PM** | ☐ Protecting the Integrity | ☐ Modernized *e-file* | ☐ Flow-Through Items |
| **3:00 PM – 3:50 PM** | ☐ Breaking Down Barriers | ☐ What Do I Do? | |

# Special Rates

## Hotels

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

| Forum Location | Hotel Information | Rate |
|---|---|---|
| **Atlantic City, NJ*** (July 8-10) | Sheraton Atlantic City<br>Two Miss America Way<br>Atlantic City, NJ 08401<br>(800) 325-3535 | $125.00 |
| **Orlando, FL** (July 22-24) | The Peabody Orlando<br>9801 International Drive<br>Orlando, FL 32819<br>(800) 732-2639 | $107.00 |
| **Atlanta, GA** (August 5-7) | Hyatt Regency Atlanta<br>265 Peachtree Street NE<br>Atlanta, GA 30303<br>(404) 577-1234 | $112.00 |
| **St. Louis, MO** (August 19-21) | Adam's Mark St. Louis<br>Fourth and Chestnut<br>St. Louis, MO 63102<br>(314) 241-7400 | $102.00 |
| **San Antonio, TX** (September 2-4) | Marriott Rivercenter<br>101 Bowie at Commerce St.<br>San Antonio, TX 78205<br>(800) 228-9290 | $106.00 |
| **Las Vegas, NV** (September 16-18) | Rio All Suites Hotel<br>3700 W. Flamingo<br>Las Vegas, NV 89103<br>(888) 746-6955 | $108.00 |

**The forum will be held in the adjacent convention center.*

*Note: Special rates are guaranteed until 30 days from the first day of each forum.*

## Airlines

| Airline Carrier | Telephone | City | Gold File Number |
|---|---|---|---|
| **U.S. Airways** | (877) 874-7687 | Atlantic City | 34132653 |
| **Southwest** | (800) 433-5368 | Orlando<br>St. Louis<br>San Antonio<br>Las Vegas | A 0126<br>B 0126<br>C 0126<br>D 0126 |
| **Delta** | (800) 241-6760 | Atlanta | DMN 193975A |

## Car Rental

| Car Rental Agency | Telephone | Gold File Number |
|---|---|---|
| **Hertz** | 1-800-654-2240 | CV#02QT0003<br>(for all cities) |

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