Tax Professionals and the IRS: Successfully Working Together Conference

Wednesday, June 18, 2014 | Laurel Manor, Livonia

WHY ATTEND

They say face-to-face communication is most effective, so when it comes to understanding complicated rules and regulations and forging relationships, why would you go anywhere else? Join professionals from the IRS at this important opportunity that will clarify questions and uncertainties you have while providing important networking opportunities.

KEYNOTE PRESENTATIONS

Your SB/SE Updates – Straight from the Source θ

There is no better way to stay up-to-date on the important issues affecting tax returns on small businesses than to hear directly from Julie Foerster, Midwest Area Examination Director. Discuss important issues related to small business, unique tax situations that may occur, and proper recordkeeping and reporting to the IRS.

Julie Foerster - *Examination Director, Midwest Area, Internal Revenue Service, Seattle, WA*

Updates from the Michigan Unemployment Insurance Agency

Learn what is new at the Michigan Unemployment Insurance Agency. Information on the filing requirements and the new program related to paying taxes will be discussed in this session. Also, learn the best practices for resolving taxpayer's problems.

Linda Kalinowski - *Manager, Unemployment Insurance Agency, Detroit*

IRS Collection – What's New? ≈θ

There have been updates to the IRS's tax collection processes. Do you know how these important changes may affect you and your work? Get the latest information on the collection processes for tax liens, seizure and levy as well as wage garnishments, bankruptcy and more. You can't afford to miss it!

Sophia Houston - *Program Manager, Internal Revenue Service SB/SE Collection Field Function, Detroit*

A Walk-Through of Form 1041 ≈θ

The Income Tax Return for Estates and Trusts (Form 1041) can be a difficult document to navigate. With income tax rates increasing on these items and their beneficiaries, the effect of these taxes has never been more critical. Join this session for a walk-through of the form, best practices in efficient preparation as well as important updates you need to be aware of that affect this complicated issue.

Marilyn J. Meredith - *Enrolled Agent & Registered Tax Return Preparer, Representing Michigan Chapter – National Association of Tax Professionals, and Owner, Meredith Tax Service, Meredith Financial Research, and Much and More Income Tax Workshops, Port Huron, St. Clair & Marine City*

BREAKOUT SESSIONS

Please rank all six sessions (A-F) in preference order on the registration form. You will be assigned to four.

A] Opinions on Taxability or Deductibility - An Interactive Session ≈θ

When it comes to drawing the line between taxability or deductibility of various items, the answer is not always black and white. What are some tried-and-true techniques in differentiating between the two? This interactive session helps answer some of those difficult questions.

Marilyn J. Meredith - *Enrolled Agent & Registered Tax Return Preparer, Representing Michigan Chapter – National Association of Tax Professionals, and Owner, Meredith Tax Service, Meredith Financial Research, and Much and More Income Tax Workshops, Port Huron, St. Clair & Marine City*

B] Your Resource to the IRS Online Resources θ

There are many resources available to help practitioners do their job to the best of their ability, do you know how to take advantage of them? This informative session walks you through the materials the IRS can provide as well as how to navigate the database and tailor the information to the work that *you* do.

Lisa C. Martin - *Internal Revenue Service Stakeholder Liaison, Internal Revenue Service Tax Exempt/Government Entities, Detroit*

C] IRS Examinations: What You Need to Know ≈θ

Lack of knowledge and experience are often stumbling blocks when individuals and business taxpayers navigate an IRS audit. Hear from the IRS experts on what you can do to make these engagements run smoothly including what you can expect throughout an audit process, interacting with IRS agents, how to follow-up and appeal, audit and more.

Nadine M. Smith, EA - *The TaxAdvocate Group - Plymouth*

D] What Do We Do With Our Canadian Neighbors ≈θ

With Canada being a short drive across the river, it can be easy to forget there are glaring differences in proper tax-filing procedures. Learn about filing difference with Canadians working in the US vs. US citizens working in Canada, as well as what RRSP's are and how you deal with those. You will also look at the T1 Individual Canadian and Provincial Tax Return and "NR" forms from Canada.

Victoria Peterson, EA - *Self Employed, Atlanta, GA*

E] IRS Taxpayer Advocate Service – Your Voice at the IRS θ

As an independent organization within the IRS, we help taxpayers resolve problems with the IRS and recommend changes that will prevent the problems. The Local Taxpayer Advocate, with TAS criteria, will refocus the caseload work and how they help resolve your clients issues.

Pamara Blount - *Internal Revenue Service Taxpayer Advocate Service, Detroit*

F] Hot Topics For Non Profits ≈θ

Tax-exempt organizations are required to file IRS Form 990 to ensure that they are being transparent and remain in compliance with tax-exempt status. What are some of the current issues that affect your ability to effectively and efficiently file this document? Join our speaker for a look at the hottest issues with Form 990 and best practices you can implement to navigate through with ease.

Kathleen M. Underhill - *Tax Senior Manager, Rehmann, Troy*

"Just a great conference; not a boring minute!"

– 2013 Attendee

SCAN WITH YOUR SMARTPHONE TO REGISTER TODAY!

2014 PARTNERS

MICPA THE MICHIGAN ASSOCIATION OF CERTIFIED PUBLIC ACCOUNTANTS

American Association of Attorney-Certified Public Accountants

American Payroll Association

Michigan Society of Enrolled Agents

Michigan Association of Financial Providers

NATP Michigan Chapter

SBM State Bar of Michigan Taxation Section

≈CFP credits pending approval θEA credits pending approval

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AGENDA

8:00 am	Program Registration & Refreshments
8:30 am	Welcome & Featured Presentation – Your SB/SE Updates – Straight from the Source
9:20 am	Updates from Michigan Unemployment Insurance Agency
10:10 am	Morning Break & Networking Opportunity
10:20 am	IRS Collection – What's New?
11:10 am	A Walk-Through of Form 1041
12:00 pm	Group Luncheon
12:50 pm	Breakout Sessions
1:50 pm	Breakout Sessions
2:50 pm	Breakout Sessions
3:50 pm	Breakout Sessions
4:40 pm	Adjournment

PROGRAM LOCATION

Laurel Manor
39000 Schoolcraft Rd. | Livonia, MI 48150 | 734.462.0770

Special MICPA rates are available for overnight accommodations at the Hilton Garden Inn, Plymouth 734.354.0001

RECOMMENDED CPE CREDIT

8 Other hours. Some sessions may qualify for CFP and /or EA credit

REGISTER ONLINE TODAY!

www.micpa.org/IRSC or call 1.855.594.4273
Or use the registration form to the right

Course Code: 30509
Price with e-materials: $125 per registrant
Price with paper materials: $155 per registrant

CUSTOMIZE YOUR EXPERIENCE

A benefit of attending this conference, is that you are able to customize your experience! Choose your preferred sessions and based on your choices, and the preferences of other registrants, we arrange the conference schedule so you are assigned the topics most important to you. When registering, please rank all six of the breakout sessions in your preferred order (A-F). You will be assigned to four sessions.

E-asy, E-fficient, E-conomic, E-lectronic… e-Materials!

After introducing e-Materials in 2013, the MICPA was able to cut down on 4 million paper copies per year! With positive feedback from attendees, we are excited to announce that e-Materials are here to stay! Access your e-Materials 48 hours prior to your program by visiting www.micpa.org/ematerials. If you prefer paper copies, you can still request them when you register for a small additional cost. For more information about e-Materials visit www.micpa.org/ematerialsFAQ.

REGISTRATION

TAX PROFESSIONALS AND THE IRS: SUCCESSFULLY WORKING TOGETHER CONFERENCE

COURSE CODE: 30509

❑ Price with e-Materials: $125 per registrant

❑ Price with paper materials: $155 per registrant

Please rank all six breakout sessions (A-F) in preference order below. You will be assigned to four:

1st ___________ 2nd ___________ 3rd ___________

4th ___________ 5th ___________ 6th ___________

PERSONAL INFORMATION

Name of Registrant ______________________________________
Please print First Middle Last

E-mail Address ______________________________________

Name for Badge ______________________________________

Firm/Company ______________________________________

Address ______________________________________

City ______________________ State ______ Zip ____________

Telephone ( ) ______________________________________

Mobile Phone ( ) ______________________________________
(For emergency use only)

❑ This is a permanent address change.

If you require special accommodations, please contact the MICPA office, 248.267.3700.

PAYMENT OPTIONS

❑ Make check payable to The Michigan Association of CPAs for $___________ .

❑ Please bill me $______________________ *(MICPA member option only).*

Please charge my: ❑ MasterCard ❑ Visa ❑ American Express ❑ Discover $____________

Cardholder's Name______________________________________

Cardholder's Email______________________________________

Card Number ______________________________________

Exp. Date ____________________ CVV2 Code ____________________

Signature ______________________________________

CANCELLATION POLICY: If you cannot attend a program for which you are registered, call, fax, e-mail or write the MICPA at once. Cancellations received at least five (5) business days prior to the program date will be eligible for full refund or a credit. Cancellations received less than five (5) business days prior to the program date are subject to the following fees: $50 service charge on 8-hour or longer courses, $20 service charge on half-day events, $15 service charge on 2-hour events and a $10 service charge on 1-hour events. Credit balance(s) maintained with the MICPA as a result of cancellations, that are not used within one (1) year of the cancellation date, will be considered forfeited. **Cancellations will not be accepted on or after the program date. Substitutions will be allowed until the start time of the program without penalty.**

E-MATERIALS CANCELLATION POLICY: Refunds or credit will not be given once e-Materials have been downloaded and registrant is responsible for full balance of course and materials.