

2007 Tax Professionals and the IRS: Successfully Working Together

Featuring
National IRS
Speakers
**Robert Johnson &
Charlie Brantley**

Wednesday, June 13, 2007 - Rock Financial Showplace, Novi

NOT TO BE MISSED Conference for the Tax Practitioner



Taxation Section



Michigan
Association
of Financial
Providers

National
Society of Tax
Professionals

Course Code: IRS

RECOMMENDED
CPE CREDIT:
8 Hours

AGENDA

8:00 AM Registration & Refreshments

8:30 AM Welcome & Program Overview

8:45 AM Practitioner Compliance: Ethics & Practice Standards

Acquire the knowledge to understand the compliance issues and practice standards the IRS looks for and how to apply them. Review the ethical expectations involved in a tax practice.

Robert Johnson - Senior Program Analyst, Office of Professional Responsibility, Internal Revenue Service, Washington, D.C.

10:00 AM Employee Benefit Plans Panel Discussion

The expert panel will share the latest information on Employee Benefit Plans. They will discuss common mistakes and how to avoid them.

Deborah Thompson - Revenue Agent, Employee Plans, Internal Revenue Service, Grand Rapids

Gerald J. Wernette, CPA - Principal/Director, Retirement Plan Services, The Rehmann Group, Troy

David Fillo, QKA, QPA, CEBS - Vice President, Great Lakes Pension Associates, Inc., Farmington Hills

Moderator: **Larry Burleson** - Employee Plans Group Manager, Internal Revenue Service, Detroit

11:15 AM Morning Break & Networking Opportunity

11:25 AM Michigan Department of Treasury Season Wrap-Up

The Michigan Department of Treasury updates you up on the latest state information and issues they experienced during this tax season.

Chris Bourque - Assistant Administrator of Tax Processing Bureau, Michigan Department of Treasury, Lansing

12:15 PM Group Luncheon

1:05 PM IRS Audits & Examinations

Gain a detailed understanding of IRS audit rates and how they have affected individual and business taxpayers. Receive information regarding the issues and direction the IRS is heading in during the upcoming year. Also, learn what to do when you receive a notice of an examination and when it may be necessary to seek legal help.

Charlie Brantley - Regional Director of Examination, Internal Revenue Service, Philadelphia, Pa.

1:55 PM Inside IRS: Practitioner Priority, CP2000 & Issue Management Resolution System

What services has the IRS established to assist you in getting answers to your questions? Get the inside scoop on what Practitioner Priority Service can do to assist you. Gather information on the Notice CP2000 system and the IRS Automated Underreporter Program. Hear the latest on a resolution system that will help you resolve systemic issues and other procedural concerns with IRS policy. Plus, learn about the Issue Management System, another tool the IRS has implemented to assist you in addressing you and your clients' federal tax concerns.

Lisa Martin - Stakeholder Liaison, Internal Revenue Service, Detroit

Barbara Stack - Stakeholder Liaison, Internal Revenue Service, Detroit

3:10 PM Afternoon Break & Networking Opportunity

3:20 PM IRS Collections

Learn about collections by the IRS including seizures, levies, garnishments and other collection tools. Become knowledgeable about the new programs and procedures the IRS has implemented to assist in getting collection issues resolved in a timely manner. Understand how to address installment payments, appeals and more. You will recognize the penalties that are given and how to help your clients avoid or prepare for them.

B.J. Caldwell - Territory Manager, Internal Revenue Service, Detroit

4:35 PM Adjournment

CRITICAL, CONTEMPORARY, UP-TO-DATE INFORMATION

Register online today, call 1.888.877.4273 or send the registration form on back!

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Registration Fee: \$99

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Register me for the **Tax Professionals and the IRS: Successfully Working Together**

Name of Registrant _____
Please print *First* *Middle* *Last*

Name for Badge _____ Position _____

Firm/Company _____

Address _____

City _____ State _____ Zip _____

Telephone (_____) _____ Fax (_____) _____

E-mail Address _____

This is a permanent address change.

Please send confirmation by: E-mail U.S. mail

If you require special accommodations, please contact the MACPA office.

PAYMENT OPTIONS

Enclosed is a check for \$ _____ payable to The Michigan Association of Certified Public Accountants.

Please bill me \$ _____ (MACPA member option only).

Please charge my: MasterCard Visa American Express \$ _____

Firm Card or Personal Card

Card Number _____ CVV2 Code _____ Exp. Date _____

Signature _____

Location:

ROCK FINANCIAL SHOW PLACE
46100 Grand River Ave., Novi, MI 48374
Phone: 248.348.5600

Overnight accommodations are available at the Hotel Baronette, Novi (248.349.7800). Please identify yourself as an MACPA member to receive the special group rate.

Make your reservations early. Facilities release room blocks 3-4 weeks before the program. Rates cannot be guaranteed after this time.

To ensure a trouble-free commute, before driving, check for the latest road construction by visiting www.michigan.gov/mdot/

FIVE EASY WAYS TO REGISTER

Web site: www.michcpa.org

E-mail: macpa@michcpa.org

Fax: 248.267.3737

Phone: 248.267.3700

Toll-Free in Michigan:

888.877.4CPE (4273)

Mail: MACPA, 5480 Corporate Drive, Suite 200, PO Box 5068 Troy, MI 48007-5068

The Michigan Association of
MACPA
Certified Public Accountants



Michigan Association of Financial Providers

National Society of Tax Professionals

Cancellation Policy: If you find you cannot attend a program for which you are registered, call, fax, e-mail or write the MACPA 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: \$40 service charge on 8-hour and longer courses, \$20 service charge on half-day events, \$10 service charge on 2-hour events and a \$5 service charge on 1-hour events. Credit balance(s) maintained with the MACPA 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.**