

EARLY BIRD DISCOUNT
Register by **October 20, 2016**



2016 | Illinois CPA Society

November 10, 2016 | Des Plaines, IL

IRS/Tax Practitioners Symposium

Interact with experts, hear the latest updates and improve communication between tax professionals and the IRS.



ILLINOIS CPA SOCIETY®
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- Identify Theft Initiatives and Taxpayer Advocate Service Updates
- IRS and IDOR Best Practices
- **BONUS SESSION!**
The Power of Attorney and the IRS

IRS/Tax Practitioners Symposium

Why Should You Attend this Symposium?

The annual IRS/Tax Practitioners Symposium brings together state and federal tax practitioners in an interactive learning experience. This conference showcases best practices for collaboration and a better understanding of behavioral and legal issues. Identify the current trends and issues impacting the Exam and Collection area of the IRS and tax professionals. And, don't miss your chance to get guidance directly from IRS and IDOR staff—register for this crucial event today!

Agenda at a Glance

7:30 am - 8:15 am	Registration and Continental Breakfast
8:15 am - 8:45 am	Welcome Address and Overview of the Day
8:45 am - 9:45 am	What Every Practitioner Needs to Know About the Taxpayer Advocate Service
9:45 am - 10:00 am	Networking Break
10:00 am - 11:00 am	Identity Theft
11:00 am - 12:00 pm	Appeals – Helping You Help Your Client
12:00 pm - 12:45 pm	Networking Lunch
12:45 pm - 2:15 pm	Illinois Department of Revenue: Audit – Collection – Resolution
2:15 pm - 2:30 pm	Networking Break
2:30 pm - 3:30 pm	Successfully Navigating the Examination Process
3:30 pm - 4:30 pm	2016 Collection Initiative
4:30 pm - 5:00 pm	Bonus Session – Offense v. Defense – The Power of Attorney and the IRS

Top Reasons to Attend:

- 1** Unique opportunity to interact with IRS & IDOR staff
- 2** Get the latest updates for the 2017 filing season
- 3** Learn to successfully navigate the exam, appeals & collection processes

Symposium Details:

Des Plaines

Date: November 10, 2016 | **Course Code:** C42328

Location: Café La Cave, 2777 Mannheim Rd, Des Plaines, IL

Time: 7:30 am registration; 8:15 am - 5:00 pm program

Early Bird Registration: \$210 members | \$210 non-members

Regular Symposium Registration: \$235 members | \$235 non-members

Credits: Earn 8.5 CPE Credits (if you attend the optional bonus session), including 8.5 Taxation, 7.25 CLE, 7 EA

How to Register:

Online:

To register online, visit us at the Illinois CPA Society's website:

www.icpas.org

Phone:

Call us from 8:00 am to 5:00 pm, Monday through Friday at:

800.993.0407 then dial 4

100% Satisfaction Guarantee

We strive to deliver the highest quality educational experience. If you are not satisfied, call us at 800.993.0407, option 4 and we will make it right.

All program information is subject to change. Please verify upon registration.

NOTE: Any fees charged by the sponsoring institution(s) are exclusive of the Internal Revenue Service. There is no charge by the IRS for this event.

7:30 am – 8:15 am **REGISTRATION & CONTINENTAL BREAKFAST**

8:15 am – 8:45 am **WELCOME ADDRESS & OVERVIEW OF THE DAY**

Symposium Chairs: Michael J. Singer, CPA, President, Michael J. Singer and Company, P.C., Northbrook, IL

Yolanda Ruiz, Stakeholder Liaison, Internal Revenue Service, Chicago, IL

8:45 am – 9:45 am

What Every Practitioner Needs to Know About the Taxpayer Advocate Service

Speakers: Pamela S. Bates, Local Taxpayer Advocate, Taxpayer Advocate Service, Chicago, IL

Robert E. McKenzie, JD, Attorney, Arnstein & Lehr LLP, Chicago, IL

Determine what issues are appropriate to bring to the Taxpayer Service office. Get your questions answered by a local Taxpayer Advocate.

Key Takeaways:

- Gain information about the Annual Report and Objectives Report to Congress
 - Examine the taxpayer advocate processes
-

9:45 am – 10:00 am **NETWORKING BREAK**

10:00 am – 11:00 am

Identity Theft

Speaker: Justin McCarty, Management & Program Analyst, Internal Revenue Service, Washington, D.C.

Identity theft is more prevalent than ever before. Learn what the IRS is doing to mitigate the risks and how preparers can help educate clients about the steps they should take if they become a victim.

Key Takeaways:

- Discuss changes the IRS is making to combat identity theft and how they will impact next year's filing season
- Learn tips to protect yourself and your clients from identity theft

11:00 am – 12:00 pm

Appeals – Helping You Help Your Client

Speakers: Debra Dufek, Appeals Team Manager, Internal Revenue Service – Appeals, Chicago, IL

Jim Helfrich, Supervisory Appeals Officer, Office of Appeals, Chicago, IL

Larry J. Wolfe, CPA, President, Larry J. Wolfe, Ltd., Skokie, IL

Hear what makes an effective appeal and how to utilize them to your client's advantage. Learn about the policy and procedural changes that are affecting exam and collection appeals.

Key Takeaways:

- Review appeals correspondence and conference guidelines
- Learn how the new docketed case procedures work

12:00 pm – 12:45 pm NETWORKING LUNCHEON

12:45 pm – 2:15 pm

Illinois Department of Revenue: Audit – Collection - Resolution

Speakers: Audit and Collection Representatives

Kevin Richards, Electronic Commerce Division, Illinois Department of Revenue, Springfield, IL

Theodore A. Sinars, JD, Partner, Madden, Jiganti, Moore & Sinars LLP, Chicago, IL

George Smith, Individual Processing Division Manager, Illinois Department of Revenue, Springfield, IL

This interactive panel discussion will focus on how to resolve sales and income tax audits and the availability of collection alternatives. Additionally, the IDOR will report on the filing season and the factors they consider when resolving sales tax cases.

Key Takeaways:

- Discover what happens after you file a Protect
- Examine settlement protocol in administrative and court hearings
- Discuss collection alternatives other than full pay

2:15 pm – 2:30 pm NETWORKING BREAK

2:30 pm – 3:30 pm

Successfully Navigating the Examination Process

Speaker: Exam Director Midwest Area Representative

Steven D. Craig, EA, Tax Controversy Specialist, Larry J. Wolfe, Ltd., Skokie, IL

Participants will gain an understanding of how tax professionals can work together with the IRS to resolve issues in tax examination and receive an overview on the latest changes in exam programs, priorities and procedures.

Key Takeaways:

- Identify current IRS priorities
- Understand taxpayer and representative rights and power of attorney issues

3:30 pm – 4:30 pm

2016 Collection Initiative

Speakers: Stan Green, CPA, Head of Tax Controversy Department, Larry J. Wolfe, LTD, Skokie, IL

David Preston, Collection Territory Manager, Internal Revenue Service, Schiller Park, IL

Attendees will discuss the latest on employment tax initiatives including federal tax deposits, collection due processes and collection appeals. Learn about Revenue Officer Initial Contact and Taxpayer Rights.

Key Takeaways:

- Learn tips for dealing with Field Revenue Officers
- Hear about Offer in Compromise (OIC) changes

4:30 pm – 5:00 pm

Bonus Session – Offense v. Defense – The Power of Attorney and the IRS

Speakers: Michael J. Singer, CPA, President, Michael J. Singer and Company, P.C., Northbrook, IL

Larry J. Wolfe, CPA, President, Larry J. Wolfe, Ltd., Skokie, IL

Find out when to file a Power of Attorney and the best uses to represent your client. Learn how to obtain a list of all outstanding authorizations you have on file with the IRS and how to manage them.

Key Takeaways:

- Explore other types of authorizations that can be valuable to resolve IRS issues
- Learn when to use Form 1310 and Form 56 with a Power of Attorney

Special Thanks to Our Symposium Chairs and Sponsors:

Symposium Chairs: Michael Singer, CPA, Principal, Michael J. Singer and Company, P.C., Northbrook, IL

Yolanda Ruiz, Stakeholder Liaison, Internal Revenue Service, Chicago, IL

Event Sponsors:

- Internal Revenue Service
- Illinois Society of Enrolled Agents
- Chicago Bar Association
- DuPage County Bar Association
- Independent Accountants Association of Illinois
- Tax Practitioners of Illinois
- Illinois Department of Revenue
- University of Illinois Tax School

Upcoming Conferences

September 20	Des Plaines	Midwest Financial Reporting Symposium
September 27	Oak Brook	Financial Institutions
October 20	Chicago	Fraud & Forensic Symposium
October 25	Oak Brook	Construction
October 26	Chicago	Manufacturing
November 3	Des Plaines	Healthcare Compliance & Fraud Half-Day
November 17	Rosmeont	Not-for-Profit
November 18	Chicago	Women's Leadership Forum
November 30	Rosemont	Accounting & Auditing
December 1	Springfield	
December 2	Springfield	Not-for-Profit
December 7	Chicago	Advanced Topics in Flow-Through Taxation Half-Day
December 13	Rosemont	Employee Benefits
January 26, 2017	Chicago	State & Local Tax
March 23, 2017	Rosemont	Controllers



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