IRS Nationwide Tax Forums

2002

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 six 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 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 3 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.

CATCH UP WITH TIGTA!

Hear how the Treasury Inspector General for Tax Administration protects the integrity of our tax system.

From the Commissioner

I would like to take this opportunity, on behalf of the dedicated men and women of the Internal Revenue Service, to personally welcome each of you to the Internal Revenue Service Nationwide Tax Forums for 2002.

Last year, a record number of tax professionals—almost 14,000 of you—participated in the six forums sponsored by the Internal Revenue Service across the nation. This year, even more of you will take advantage of this opportunity. By spending just a few days with us, you can register to become an *e-file* provider, learn about recent IRS initiatives, and engage in valuable dialogue with IRS personnel, tax product vendors, and your peers. For the first time, you can also attend a seminar describing tax scams and schemes and the measures we are taking to identify and stop them.

The Nationwide Tax Forums provide us with the opportunity to more fully engage you in shaping the new IRS. As tax professionals, you play a vital role in helping us achieve our modernization goals. As I met with representatives of tax professional organizations this past year, they never failed to express their high level of interest in supporting our modernization effort. They offered countless valuable suggestions for developing our programs. We look forward to continuing this dialogue with the tax professional community at these forums and in the future.

Our task is enormous. The final numbers from fiscal year 2001 illustrate the complexity and magnitude of our charge. In fiscal year 2001, the IRS collected $1.9 trillion, processed over 130 million individual returns, and issued more than 92 million refunds. IRS representatives met with 7.4 million taxpayers, answered 108 million telephone calls, and responded to 19.2 million letters. Notwithstanding the incredible size of these numbers and efforts, the inquiries, returns, payments, and refunds were efficiently processed. We removed barriers and increased incentives for the electronic filing of returns and payment of taxes. We developed and administered many key initiatives that increased the rights afforded taxpayers. We stabilized several key compliance activities and worked diligently to ease the burden on those affected by the September 11 terrorist attacks.

We continue to build on this progress into 2002. Early this year, we unveiled the revamped IRS Web site that will help take us from an information-only portal to a world-class, transaction-based gateway. At the same time, we continued to modify programs and resources to streamline and enhance service. For example, we introduced Practitioner Priority Service—a toll-free telephone number staffed by employees specially trained to respond to practitioners' account-related questions. We centralized other programs as well. We reduced the number of service center campuses involved in EIN issuance, Centralized Authorization File, and Combined Annual Wage Reporting—to name a few.

As often happens, revamping these programs causes some bumps in service along the way. So I am particularly grateful for the patience, support, and feedback we have received from the tax professional community as we adjusted staffing and otherwise ironed out the wrinkles in these programs. I believe we are on the right track with these changes. Centralization and consolidation of many of our programs will ultimately streamline the related business processes, make more efficient use of specialized resources, and thus better serve taxpayers.

Once again, welcome to the 2002 Nationwide Tax Forums. As you attend the seminars and events described in this brochure, you will see evidence of our dedication to delivering top quality customer service. With your continued support and active participation, we are steadily closing the gap between where we were and where we want to be for our customers. Thank you.

Charles O. Rossotti

Charles O. Rossotti
Commissioner, Internal Revenue Service

Welcome Aboard!

This year's tax forums will be bigger and better than ever before, offering several advanced seminars for returning attendees, while continuing to provide basic sessions for first time attendees. We offer three full days of seminars and we are introducing a new concept in four cities called "Mega Forums". The Mega Forums will offer the same seminar schedule as the other two forums, but will be expanded to include special value-added events. For those seeking Continuing Professional Education (CPE) credits, a total of 21 credits may be earned.

This year, the opportunity to interact with IRS executives and other tax professionals is greatly expanded in both formal and informal settings. In addition to the ever-popular Commissioner's Address, we will host an executive panel discussion designed to address general tax professional concerns.

The awards dinner offered on the second night of the forum 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.

Vendors will display and discuss their latest business products. The vendor demonstration room will offer additional opportunities with which to assess the products important to tax professionals in a more focused, "hands-on " environment.

Please carefully review the schedule of seminars. Traditionally, most seminars are repeated. Some are offered the first day and repeated the second. Others are offered the second day and repeated the third. However, to afford maximum choice by participants, ***there are several seminars that are offered only once.*** We recommend that first time participants plan to spend the full three days with us for maximum benefit. Tax forum 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 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).

Mega Forums

The new Mega Forums will be offered in four cities this year: Atlantic City, NJ; Atlanta, GA; New Orleans, LA; and Reno, NV. The Mega Forum is designed to accommodate very large audiences and also provides additional events. This year, the Mega Forums will feature the overwhelmingly successful Case Resolution Program, piloted last year. You will have an opportunity to bring in your toughest case (one case only) and receive one-on-one assistance from our experienced technical specialists. Feedback from last year's pilot was extremely positive. We successfully resolved 87 percent of the cases on-site and assigned the remaining cases to local offices, where most were resolved within 30 days. To provide you with the maximum opportunity to attend the seminars, we have designed a "by appointment only" schedule for the Case Resolution Program. ***You may make your appointment at the IRS Information Booth as early as Monday evening during pre-registration. If you would like to participate in the Case Resolution Program, please check the designated block on the attached registration form.***

The Mega Forums will also feature a new partnership among the IRS, 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 assist with seminar presentations, provide exhibit booths and conduct special events. Both the NATP and NSTP will offer seminars at selected forums on popular topics of interest to the tax professional community. The Pennsylvania Chapter of the NAEA will host a special seminar, entitled "How to Become an Enrolled Agent," at each Mega Forum. Additionally, the New Jersey chapter of the NAEA will conduct their annual meeting during the Atlantic City Forum.

The Mega Forums will also introduce an executive panel discussion designed to address general concerns in the tax professional community and disseminate key organizational messages. Top IRS executives will be available to answer your questions. Participants will have an opportunity to prepare questions in advance for executives to address.

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.)*

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 portion of this brochure.

Professional Credit

Attendance at these seminars will qualify for Continuing Professional Education (CPE) Credits for Enrolled Agents. Other professional groups should consult their respective 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 21 for each forum location.

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.

Registration Fee

The basic fee for this year's tax forums is **$65** for the first member of a business or organization, **$55** for the second attendee from the same business or organization, and **$40** 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.

Practitioner Case Resolution At The Forums

As part of IRS' continuing effort to provide top quality service to taxpayers and their representatives, the Atlantic City, Atlanta, New Orleans and Reno tax forums will include the "Practitioner Case Resolution At The Forums" program. This program provides an opportunity to resolve client issues through IRS' Everyday Tax Solutions assistance and 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.

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.

Awards Dinner

On Wednesday evening, please plan to join us for the awards 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 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.***

Schedule

Day 1

7:00AM	Registration Begins
7:00AM - 5:00PM	Case Resolution Room (MEGA FORUMS ONLY)
8:00AM - 12:10PM 1:30PM - 5:00PM	Seminars
8:00AM - 4:00PM	ERO & EFTPS Sign Up
9:00AM - 6:00PM	Exhibit Hall Open
11:20AM - 12:10PM	Commissioner's Address
12:10PM - 1:30PM	Lunch
5:00PM - 6:00PM	Welcome Reception in Exhibit Hall

Day 2

7:00AM	Registration Begins
7:00AM - 5:00PM	Case Resolution Room (MEGA FORUMS ONLY)
8:00AM - 12:10PM 1:30PM - 4:20PM	Seminars
8:00AM - 4:20PM	ERO & EFTPS Sign Up
9:00AM - 3:00PM	Exhibit Hall Open
12:10PM - 1:30PM	Lunch
6:30PM	Awards Dinner

Day 3

7:00AM	Registration Begins
7:00AM - 3:00PM	Case Resolution Room (MEGA FORUMS ONLY)
8:00AM - 11:50AM 1:00PM - 3:50PM	Seminars
8:00AM - 3:00PM	ERO & EFTPS Sign Up
11:50AM - 1:00PM	Lunch

Seminar Topics

1. 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). This session will define backup withholding, provide an overview of Form W-9, advise the payer with respect to the actions required when a CP2100 Notice is received, and outline the steps necessary to establish reasonable cause when a proposed penalty 972CG Notice is received.

2. Collection Due Process Hearings 101

This practice-oriented panel, conducted by employees actively working Collection Due Process (CDP), will explain what a CDP hearing is, and what Appeals expects of someone requesting a hearing.

3. Communicating with the IRS

When your client has a problem with the IRS, they expect you to know how to resolve it 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 help your client resolve the problem. Presented by the National Association of Enrolled Agents.

4. Education Menu: Choices, Choices and More Choices

This presentation provides a complete review of the tax law changes regarding new education programs including: Education Savings Accounts (Coverdell Accounts); Qualified Tuition Programs; Hope and Lifetime Learning Credit; New 2002 Deduction for Higher Education Expenses; Student Loan Interest Deduction; and Employer-provided Educational Assistance. Presented by the National Society of Tax Professionals.

5. *e-file* Compliance Panel

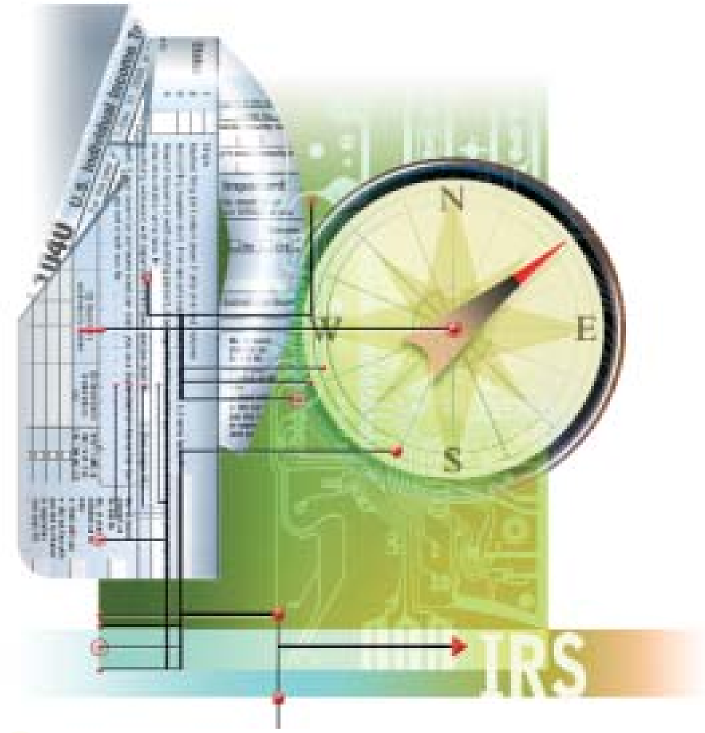
Hear discussions of IRS *e-file* compliance issues including IRS *e-file* rules, monitoring of providers, and appeal of suspensions from the *e-file* Program.

6. *e-file* for Beginners

Learn about the requirements for becoming an Authorized *e-file* Provider from the application process through *e-filing* the first return.

7. EITC Panel

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



8. EITC Survival Tips

What do you need to know for clients who wish to claim or should claim the EITC on their federal income tax return for 2002? Join us for a presentation of this year's successes, 2002 changes in the EITC tax law, upcoming programs for education outreach, and compliance enforcement plans.

9. Executive Panel Discussion

A panel of IRS executives will conduct a panel discussion addressing key organizational issues and hot topics. They will also answer your general questions in this high-powered session. Attendees will have an opportunity to prepare questions in advance for IRS executives to address.

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

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.

11. The FIRE System

Don't be 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 Filing Information Returns Electronically or FIRE System. This session will discuss the advantages and specifications designed exclusively for the electronic filing of information returns, instructions for new filers, common problems associated with electronic filing, and will provide a LIVE demo of the FIRE system.

12. Form 4797 – Sale of Assets

This seminar will give you a real world understanding of ordinary capital gains and/or losses. You will learn the Recapture Rules of IRC Sections 1231, 1245, 1250, 1252, 291, etc. You will learn how to calculate gains and loses without completing Form 4797, and likewise, determine if your computer's computations are correct. Presented by the National Association of Tax Professionals.

13. Guided Tour of *e-services* for the Third-Party Community

Take a guided tour of the *e-services* registration and application processes that will be available later this year. Preview the new *e-services* and learn how to navigate the system as an authorized member of the third party community.

14. Introduction to Exempt Organizations

Whether it's a boosters club, church group or sports league, if you work with tax-exempt organizations you must attend this seminar. Topics include tax-exempt filing requirements and the Exempt Organizations *e-file* Program.

15. LMSB/Appeals Fast Track Dispute Resolution Process

This session will present an overview of the procedures involved in the new dispute resolution process, that is designed to expedite the traditional examination process. The presentation will include the following aspects of this new procedure: increase issue resolution at the lowest level; use of Appeals tools in large case examinations; and decrease the amount of time required to proceed from the return filing date to the ultimate conclusion of the case.

16. The Modernized *e-file* of the Future – starting in 2004!

An overview of the all-new *e-file* system. We are building a system that will grow and serve us for years to come. This system is based on input from our customers and partners, and will address the old system's limitations, constraints, and lack of standardization. Find out about filing complex returns; multiple file types and formats; standardized acknowledgements; standardized reject codes; and other enhancements that will make *e-file* your filing choice because it works for you and your clients.

17. National Research Program – Ensuring Fairness by Measuring Taxpayer Compliance

Learn about the National Research Program (NRP), a new, less-intrusive system of measuring compliance that will ensure fairness, yet be far less burdensome for taxpayers. Hear about the IRS' plans to eliminate up to 15,000 unnecessary audits of compliant taxpayers each year and focus tax enforcement on under-reporting and non-filing taxpayers.

18. The New Appeals

This high-level management presentation will focus on the current "hot" issues in Appeals.

19. New Compliance Programs Affecting Taxpayers

Learn about Examination and Collection Reengineering Programs and their impact on the audit and collection processes. Learn about the Anti-Money Laundering Program. The first crucial step in protecting your business is learning the legal requirements that apply to you, what you should do to meet these requirements, and why it is more important than ever to know your customer.

20. New Customer Account Services Affecting Practitioners

Learn about the new Practitioner Priority Services (PPS), formerly the Practitioner Hotline, Centralized Authorization File (CAF), Centralized Employer Identification Number (EIN), and transcripts on-line.

21. Offer-In-Compromise Program

Learn about the latest changes to the Offer-In-Compromise (OIC) program changes and most recently issued guidance that can help you help your clients. Learn which OICs are eligible and which are not.

22. On the Cutting Edge with IRS Lockbox

This presentation will focus on new addresses for all form types due to realignment of the states and the use of the voucher due to the separate mail-out of the Form 1040-V vouchers. The session will also discuss the advantages of using IRS tax forms.

23. On the Move to Better Processing

We recognize the importance of keeping customers informed and up-to-date in our fast paced world. This session will focus on the Service Center side of processing. This presentation will discuss paper processing and the impact on your customers.

24. Overview and Updates on IRS *e-file* for Form 1040

This session will provide information regarding IRS *e-file* programs and products for the Form 1040, U.S. Individual Income Tax Return. This seminar will discuss the programs currently available and enhancements for the upcoming filing season, including additional forms to be processed and changes to the processing of Schedule D.

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

This session will provide all you need to know to file Forms W-2/W-3 with the Social Security Administration.

26. Privacy Builds Trust

Learn how IRS privacy initiatives—the Privacy Impact Assessment, our Internet policy and disclosure rules—protect you and your client's tax information. The IRS

guarantees privacy, whether you use traditional methods or file electronically. Ensuring privacy builds trust in our electronic systems, trust that will encourage your clients to use current e-government services and those of the future.

27. Retire with a PLAN

Help your clients choose a retirement plan for their employees. What are the advantages of having a retirement plan? What options are available for your clients to consider? The full array of tax-favored retirement vehicles for small business owners will be discussed. Plus "What's Next" after establishing a plan.

28. SIMON SAYS "Benchmark" – Differentiate/Define Customer Needs (Part I)

In "Marketing for the 21st Century," Dr. Skip Ulmer discussed strategic planning, flexibility in the face of change, working to develop committed employees, and customer focus as essential elements for competitive success. Now, see what highly-regarded corporations, such as Timberland and Coca-Cola, are doing to prepare for the future. This session will show you how to differentiate your products and services and how to define your customer's needs.

29. SIMON SAYS "Benchmark" – Customer Service/Company Culture (Part II)

In Benchmark Part II, Dr. Skip Ulmer will show you what well-respected corporations, such as Whole Foods Company and Southwest Airlines, do to create exceptional customer service and extraordinary company culture. Learn how to individualize your customer service and create an outstanding company culture for your business.

30. Support Panel for Authorized IRS *e-file* Providers, Transmitters and Software Developers

Learn about the various support services available to you as an IRS *e-file* Provider. The panel will include IRS representatives addressing the Electronic Management System (EMS) Help Desk, QuickAlerts system, the Marketing Tool Kit updates and more.

31. Taxpayer Advocate Service: Advocacy In Action

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 can 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.

32. Tax Scams, Schemes and Cons

Learn about today's most prevalent abusive tax schemes, how to identify potential scams and how to avoid them. Gain insight into IRS activities regarding the identification of schemes and the prosecution of offenders.

33. Technology-Based Products & Services Affecting Small Businesses

Learn how the Electronic Federal Tax Payment System (EFTPS) can help you solve tax-paying problems with your clients. Learn about the easy ways the Department of Treasury can help you market EFTPS to build stronger client relationships. Hear what's new on the Small Business Web site and what new and exciting small business products are available to assist your clients, such as the Virtual Small Business Workshop CD-ROM.

34. Transitioning to *e-file* for Tax Accounting Professionals

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

35. Wage & Investment Compliance Issues: Examination and Collection

Among the topics to be covered: EITC examinations; Correspondence Audit issues; Collection issues; Automated Underreporter issues; current trends; and practitioner issues.

36. What's New in Tax Forms & Publications for Tax Year 2002

We will discuss the significant tax law changes that take effect in 2002 and the related new and revised tax forms, instructions, and publications.

Day 1

Time	Seminar Room 1	Seminar Room 2	Seminar Room 3	Seminar Room 4
8:00AM-8:50AM	Modernized *e-file* of the Future	Guided Tour of *e-services*	Education Menu: Choices and More** †	Filing W2/W3 Electronically†
8:50AM-9:00AM	Break	Break	Break	Break
9:00AM-9:50AM	Advocacy in Action	EITC Survival Tips	New Customer Account Services	Payroll Pointers for Filers of W2/W3 †
9:50AM-10:00AM	Break	Break	Break	Break
10:00AM-10:50AM	W&I Compliance Issues**	Overview & Updates on IRS *e-file*	Form 4797 Sale of Assets** † ‡ ±	Tech-Based Products & Services/EFTPS
10:50AM-11:20AM	Break	Break	Break	Break
11:20AM-12:10PM	Commissioner's Address	Commissioner's Address	Commissioner's Address	Commissioner's Address
12:10PM-1:30PM	Lunch	Lunch	Lunch	Lunch
1:30PM-2:20PM	Communicating with the IRS	EITC Panel	*e-file* for Beginners	The New Appeals**
2:20PM-2:30PM	Break	Break	Break	Break
2:30PM-3:20PM	Offer-in-Compromise Program**	Tax Scams, Schemes and Cons	*e-file* Compliance Panel	The FIRE System
3:20PM-4:10PM	Break	Break	Break	Break
4:10PM-5:00PM	Support Panel for Authorized IRS *e-file* Providers	National Research Program	Transitioning to *e-file* for Accounting Professionals †	Bothered by "B" Notices
5:00PM-6:00PM	Welcome Reception	Welcome Reception	Welcome Reception	Welcome Reception

Day 2

Time	Seminar Room 1	Seminar Room 2	Seminar Room 3	Seminar Room 4
8:00AM-8:50AM	Tax Scams, Schemes and Cons	Retire with a PLAN**	Modernized *e-file* of the Future	The FIRE System
8:50AM-9:00AM	Break	Break	Break	Break
9:00AM-9:50AM	Tech-Based Products & Services/EFTPS	Advocacy in Action	Privacy Builds Trust	Bothered by "B" Notices
9:50AM-10:00AM	Break	Break	Break	Break
10:00AM-10:50AM	SIMON SAYS "Benchmark" Part I	W&I Compliance Issues**	*e-file* for Beginners	The New Appeals**
10:50AM-11:20AM	Break	Break	Break	Break
11:20AM-12:10PM	Executive Panel Discussion†	Executive Panel Discussion†	New Compliance Programs**	On the Cutting Edge with IRS Lockbox
12:10PM-1:30PM	Lunch	Lunch	Lunch	Lunch
1:30PM-2:20PM	Communicating with the IRS	EITC Panel	On the Move with Better Processing	National Research Program
2:20PM-2:30PM	Break	Break	Break	Break
2:30PM-3:20PM	SIMON SAYS "Benchmark" Part II	Offer-In-Compromise Program**	*e-file* Compliance Panel	Overview & Updates on IRS *e-file*
3:20PM-3:30PM	Break	Break	Break	Break
3:30PM-4:20PM	Intro to Exempt Organizations**	EITC Survival Tips	Collection Due Process Hearings 101**	Guided Tour of *e-services*
6:30PM	Awards Dinner	Awards Dinner	Awards Dinner	Awards Dinner

** Advanced

† Indicates a seminar given one time only

‡ Indicates a seminar given at Mega Forums only

± Not available in Atlanta

Day 3

Time	Seminar Room 1	Seminar Room 2	Seminar Room 3	Seminar Room 4
8:00AM- 8:50AM	New Compliance Programs**	What's New in Tax Forms & Publications for 2002†		
8:50AM- 9:00AM	Break	Break		
9:00AM- 9:50AM	SIMON SAYS "Benchmark" Part I	Retire with a PLAN**		
9:50AM- 10:00AM	Break	Break		
10:00AM- 10:50AM	Collections Due Process Hearings 101**	Intro to Exempt Organizations**		
10:50AM- 11:00AM	Break	Break		
11:00AM- 11:50AM	SIMON SAYS "Benchmark" Part II	Support Panel for Authorized IRS *e-file* Providers		
11:50AM- 1:00PM	Lunch	Lunch		
1:00PM- 1:50PM	On the Move to Better Processing	New Customer Account Services		
1:50PM- 2:00PM	Break	Break		
2:00PM- 2:50PM	Privacy Builds Trust	LMSB/Appeals Fast Track Dispute Resolution Process**†		
2:50PM- 3:00PM	Break	Break		
3:00PM- 3:50PM	On the Cutting Edge with IRS Lockbox			

** Advanced

† Indicates a seminar given one time only

‡ Indicates a seminar given at Mega Forums only

± Not available in Atlanta

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 $65 for the first member of a business or organization, $55 for the second member and $40 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

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

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

City	Dates		
Atlantic City, NJ (July 9-11)	July 9	July 10	July 11
Ft. Lauderdale, FL (July 23-25)	July 23	July 24	July 25
St. Louis, MO (August 6-8)	August 6	August 7	August 8
Atlanta, GA (August 20-22)	August 20	August 21	August 22
New Orleans LA (September 3-5)	Sept. 3	Sept. 4	Sept. 5
Reno, NV (September 17-19)	Sept. 17	Sept. 18	Sept. 19

PRACTITIONER CASE RESOLUTION PROGRAM AT THE FORUMS (MEGA FORUMS ONLY)

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

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

8:00-8:50	☐ Modernized *e-file*	☐ Guided Tour	☐ Education Menu	☐ Filing W2/W3
9:00-9:50	☐ Advocacy	☐ EITC Tips	☐ Customer Acct. Serv.	☐ Payroll Pointers
10:00-10:50	☐ W&I Compliance	☐ Overview/Updates	☐ Form 4797	☐ Tech-Based/EFTPS

Afternoon Sessions

1:30-2:20	☐ Comm. w/IRS	☐ EITC Panel	☐ *e-file* for Beginners	☐ New Appeals
2:30-3:20	☐ OIC Program	☐ Tax Scams	☐ *e-file* Compliance	☐ FIRE System
4:10-5:00	☐ *e-file* Support Panel	☐ NRP	☐ Transitioning	☐ "B" Notices

Day 2

Morning Sessions

8:00-8:50	☐ Tax Scams	☐ Retire w/PLAN	☐ Modernized *e-file*	☐ FIRE System
9:00-9:50	☐ Tech-Based/EFTPS	☐ Advocacy	☐ Privacy	☐ "B" Notices
10:00-10:50	☐ Benchmark I	☐ W&I Compliance	☐ *e-file* for Beginners	☐ New Appeals
11:20-12:10	☐ Exec. Panel	☐ Exec. Panel	☐ Compliance Programs	☐ IRS Lock Box

Afternoon Sessions

1:30-2:20	☐ Comm. w/IRS	☐ EITC Panel	☐ Better Processing	☐ NRP
2:30-3:20	☐ Benchmark II	☐ OIC Program	☐ *e-file* Compliance	☐ Overview & Updates
3:00-4:20	☐ Exempt Orgs.	☐ EITC Survival	☐ CDP Hearings	☐ Guided Tour

Day 3

Morning Sessions

8:00-8:50	☐ Compliance Programs	☐ Tax Forms & Pubs
9:00-9:50	☐ Benchmark I	☐ Retire w/PLAN
10:00-10:50	☐ CDP Hearings	☐ Exempt Orgs.
11:00-11:50	☐ Benchmark II	☐ *e-file* Support Panel

Afternoon Sessions

1:00-1:50	☐ Better Processing	☐ Customer Account Serv.
2:00-2:50	☐ Privacy	☐ LMSB/Appeals
3:00-3:50	☐ IRS Lockbox	

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 9-11)	Sheraton Atlantic City Two Miss America Way Atlantic City, NJ 08401 (800) 325-3535	$125.00
Ft. Lauderdale, FL (July 23-25)	Wyndham Resort & Spa 250 Racquet Club Road Ft. Lauderdale, FL 33326 (954) 389-3300	$72.00
St. Louis, MO (August 6-8)	Millennium Hotel 200 South 4th Street St. Louis, MO 63102 (314) 241-9500	$90.00
Atlanta, GA (August 20-22)	Hyatt Regency Atlanta 265 Peachtree Street NE Atlanta, GA 30303 (404) 577-1234	$93.00
New Orleans, LA (September 3-5)	New Orleans Marriott 555 Canal Street New Orleans, LA 70130 (888) 364-1200	$102.00
Reno, NV* (September 17-19)	Atlantis Casino Resort 3800 S. Virginia Street Reno, NV 89502 (800) 723-6500	$65.00

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

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

Airlines

Airline Carrier	Telephone	City	Gold File Number
U.S. Airways	(877) 874-7687	Atlantic City	77112237
Southwest	(800) 433-5368	Ft. Lauderdale St. Louis New Orleans Reno	R 1641 R1072 R9965 R1662
Delta	(800) 241-6760	Atlanta	DMN 183475A

Car Rental

Car Rental Agency	Telephone	Gold File Number
Hertz	1-800-654-2240	CV#02QT0002 (for all cities)

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