
2009 IRS Town Hall Seminars

Designed to meet the needs of the busy tax professional

4 Events
32 Credit Hours

July 16
August 5
August 19
October 30

Provided by the IRS

Cosponsored by

- Oregon Society of Certified Public Accountants
- Oregon Association of Independent Accountants
- Oregon Association of Tax Consultants
- Oregon Society of Enrolled Agents
- Oregon Society of Tax Consultants
- Oregon State Bar Association

Internal Revenue Service
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Portland, OR 97204

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In partnership with Oregon tax professional organizations, the IRS Stakeholder Liaison Division invites you to attend a series of Town Hall Meetings & Tax Forum Seminars. Come hear national IRS tax analysts deliver the latest word on a variety of technical tax law topics.

IRS Town Hall Meeting

July 16, 2009 at the Holiday Inn of Wilsonville

Registration fee: \$100 when paid by July 7, 2009 / \$125 thereafter

Topics:

Partnerships

Tom Hybertson, IRS Partnership Technical Advisor, will provide an overview of the essential elements of partnership taxation. Topics to be discussed include the tax effects of contributions and distributions, calculation of each partner's adjusted basis in the partnership interest with an emphasis on the effect of partnership liabilities and the associated loss limitation rules, and IRC 754 elections and optional-basis adjustments. Tom will also delve into the tax effects of forgiveness of debt with a focus on the partnership entity and its partners. (6 hrs)

IMRS, Energy Credits, and ARRA

Brian Wozniak, IRS Senior Stakeholder Liaison, will deliver the latest news and tax updates from IRS Stakeholder Liaison including IMRS, energy credits, ARRA, and more. (1 hr)

Title 31 & the Bank Secrecy Act

Do you have any of the following clients: gas station owners, jewelers, convenience store owners, pawn brokers, or grocers? If so, they may be bound by the provisions of the Bank Secrecy Act, Title 31. Terri Malone; IRS Bank Secrecy Act Specialist. (1 hr)

IRS Town Hall Meeting

August 5, 2009 at the Holiday Inn of Wilsonville

Registration fee: \$100 when paid by July 22, 2009 / \$125 thereafter

Topics:

Death and Taxes

Retired Internal Revenue Agent Bill Tucker will discuss estate, trust, and gift tax issues that need to be addressed both before and after death. (3 hours+)

Cash Transactions, Form 8300, and Reporting Foreign Bank and Financial Accounts

Gary Watkins, Senior Tax Analyst, will explain how these provisions impact you. (3 hrs)

Oregon Board of Accountancy & the Oregon State Board of Tax Practitioners

Pat Hearn and Ron Wagner, Executive Directors of practitioner licensing and oversight. (1 hr+)

Dates / Topics

IRS Town Hall Meeting

August 19, 2009 at the Holiday Inn of Wilsonville

Registration fee: \$100 when paid by August 5, 2009 / \$125 thereafter

Topics:

Passive Activity Loss Rules

Lucy Clark, Passive Activity Loss Issue Specialist, will address how PAL rules impact individual returns, partnerships, S corporations, LLCs, trusts, and C corporations. Furthermore, §469, passive loss limitations, also has significant impact on the interest tracing rules and several other Internal Revenue Code sections. It is critical that a representative properly group – or not group – related entities; make a proper determination as to whether an activity is a rental or a trade or business; and determine whether the client materially participated in an activity. (6 hrs)

Ethics, Circular 230, Preparer Penalties, EITC Due Diligence, Practitioner Disclosure Regs

Do we need to say anymore? John Blakeman, IRS Stakeholder Liaison, will address these topics that are near and dear to every tax practitioner. (2 hrs)

The IRS Town Hall Meetings will be held at the Holiday Inn of Wilsonville

25425 SW 95th Ave., Wilsonville, OR 97070 Phone: (503) 682-2211

The Holiday Inn is offering a discounted hotel rate of \$89 for the IRS Town Hall Meetings and a delicious **Buffet Breakfast and Lunch** is included each day.

IRS / Practitioners Tax Forum:

October 30, 2009 at the Embassy Suites Hotel – Portland Airport

Registration fee: \$125 when paid by October 16, 2009 / \$140 thereafter

Topics:

- Bad Debt / Foreclosure / Short Sales / Abandonments / 1099A & 1099C Issues
- Employee vs. Independent Contractor
- IRS Tax Updates
- IRS Audit / Exam Issues / Updates
- IRS Collection Issues
- IRS Criminal Investigation and Tax Professionals

The IRS / Practitioners Tax Forum will be held at the Embassy Suites Hotel – Portland Airport

7900 NE 82nd Ave., Portland, OR 97220 Phone: (503) 460-3000

Registration for each event begins at 7:15 a.m. All events scheduled 8:00 a.m. - 4:30 p.m.

Each program qualifies for 8 hours of CPE / Level 4 (Update)

Registration / Event Info

Save! Purchase a \$350 "Season Ticket" by July 7, 2009 to attend all 4 events. Otherwise, you may register for each program individually.

FOUR REGISTRATION OPTIONS:

1. **WEB:** www.orcpa.org
2. **FAX** credit card orders to: 503-626-2942
3. **MAIL** registration form & payment to:
OSCPA Professional Development Division,
PO Box 4555, Beaverton, OR 97076-4555
4. **PHONE** registration information and payment to: 503-641-7200 / 1-800-255-1470, ext. 3

QUESTIONS?

Contact the OSCPAs at 503-641-7200 / 1-800-255-1470, ext. 3 or e-mail: profdev@orcpa.org

Registration confirmations will be provided by e-mail if available, otherwise mailed. This form may be duplicated. Refer to www.orcpa.org for cancellation and refund policies.

Reserve your spot today!

Class size is limited, so register early.

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E-mail _____

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IMPORTANT! Please check all that apply for your preferred dates and organization.

OSCPA Member 7/16 - #07417 8/5 - #07405 8/19 - #07411 10/30 - #07131

OAIA Member 7/16 - #07400 8/5 - #07406 8/19 - #07412 10/30 - #07418

OATC Member 7/16 - #07401 8/5 - #07407 8/19 - #07413 10/30 - #07419

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OSTC Member 7/16 - #07403 8/5 - #07409 8/19 - #07415 10/30 - #07421

OSB Member 7/16 - #07404 8/5 - #07410 8/19 - #07416 10/30 - #07422

We look forward to seeing you at a seminar!