Tuesday, October 21, 2014 | Rosemont, IL

IRS/Tax Practitioners Symposium

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

- ACA Updates
- OPR Referrals & CI Investigations on Tax Preparers
- Exam & Collection Best Practices
- IDOR Tax Amnesty
## Why Should You Attend this Symposium?

The annual IRS/Tax Practitioners Symposium is a unique event that brings together the IRS Stakeholder Liaisons and practitioners in an interactive case-study learning experience showcasing best practices for collaboration.

This conference will provide a forum to discuss ways to improve practices and communication between tax professionals and the IRS.

### Agenda at a Glance

<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
</tr>
</thead>
<tbody>
<tr>
<td>7:30 am - 8:15 am</td>
<td>Registration and Continental Breakfast</td>
</tr>
<tr>
<td>8:15 am - 8:30 am</td>
<td>Welcome Address and Overview of the Day</td>
</tr>
<tr>
<td>8:30 am - 10:10 am</td>
<td>Office of Professional Responsibility (OPR), IRS Criminal Investigations and Tax Practitioner Panel Discussion Part I</td>
</tr>
<tr>
<td>10:10 am - 10:25 am</td>
<td>Networking Break</td>
</tr>
<tr>
<td>10:25 am - 11:40 am</td>
<td>OPR, IRS CI and Tax Practitioner Panel Discussion Part II</td>
</tr>
<tr>
<td>11:40 am - 1:05 pm</td>
<td>Networking Luncheon and Keynote: Affordable Care Act (ACA) Updates</td>
</tr>
<tr>
<td>1:05 pm - 2:20 pm</td>
<td>Illinois Department of Revenue Panel</td>
</tr>
<tr>
<td>2:20 pm - 3:35 pm</td>
<td>Current Topics &amp; Best Practices – Examination Panel</td>
</tr>
<tr>
<td>3:35 pm - 3:50 pm</td>
<td>Networking Break</td>
</tr>
<tr>
<td>3:50 pm - 4:45 pm</td>
<td>Current Topics &amp; Best Practices – Collection Panel</td>
</tr>
</tbody>
</table>
Early Bird: Register by September 30, 2014

Top Reasons to Attend:

1. Affordable Care Act (ACA) Updates.
2. OPR Referrals & Criminal Investigations on Tax Preparers.

Symposium Details:

Rosemont
Date: Tuesday, October 21, 2014
Location: Donald E. Stephens Convention Center, Rosemont, IL
Course Code: C41762

Time: 7:30 am registration; 8:15 am - 4:45 pm program

Early Bird Registration: $205 members | $205 non-members
Regular Symposium Registration: $230 members | $230 non-members
Credits: Earn 8 CPE Credits (including 6 Taxation, 1.5 Regulatory Ethics, and 0.5 Specialized Knowledge & Applications) 8 EA Credits, 6.5 CLE Credits

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.

Program materials will be placed on our website to allow attendees to download or print in advance. Attendees will receive an email with a link to access these materials prior to the conference date.

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 – 8:30 am  **WELCOME ADDRESS & OVERVIEW OF THE DAY**

**Symposium Chairs:** Michael Singer, CPA, Founder and President, Michael Singer & Co.  
Yolanda Ruiz, Stakeholder Liaison, Internal Revenue Service

8:30 am – 10:10 am  
**Office of Professional Responsibility (OPR), IRS Criminal Investigations and Tax Practitioner Panel Discussion Part I**  
1 Taxation, 1 Regulatory Ethics  

**Speakers:**  
Karen Hawkins, Director, Office Professional Responsibility, Internal Revenue Service  
Brian Visalli, Special Agent, Criminal Investigation, Internal Revenue Service  
Robert McKenzie, Tax Attorney, Partner, Arnstein & Lehr LLP  
Theodore Sinars, Esq., Partner, Madden, Jiganti, Moore & Sinars

Preparers are now faced with increasing OPR referrals and CI investigations in ever expanding areas. Learn how to navigate when confronted with preparer audits, potential penalties, OPR referrals and review, injunctions, loss of e-filing privileges, parallel civil penalty audits, taxpayer reliance defenses and CI investigations.

**Key Takeaways:**
- Expanding exposure and what to do when confronted with various challenges
- Appropriate response guidelines for tax preparers
- Navigating OPR referrals and CI investigations

10:10 am – 10:25 am  **NETWORKING BREAK**

10:25 am – 11:40 am  
**OPR, IRS CI and Tax Practitioner Panel Discussion Part II**  
1 Taxation, 0.5 Regulatory Ethics  
(Continued Conversation).

11:40 am – 1:05 pm  **NETWORKING LUNCHEON & KEYNOTE:**  

**Affordable Care Act (ACA) Updates**  
0.5 Specialized Knowledge & Applications  
**Speaker:** Marc Lovell, JD, LLM, Assistant Director, University of Illinois Tax School
In this timely keynote address, Mr. Lovell will give you an in-depth overview of all the latest updates concerning the Affordable care Act (ACA).

- Understand the issues addressed by major IRS and HHS guidance
- Learn the questions you need to ask of clients when providing advice and preparing returns
- Master the more difficult areas of compliance or “gray areas” within the guidance

1:05 pm – 2:20 pm

Illinois Department of Revenue Panel

1.5 Taxation

**Speakers:** Kevin Richards, Electronic Commerce Division Manager, Illinois Department of Revenue  
Steve Kreiter, Audit, Illinois Department of Revenue  
Brian Fliflet, Deputy General Counsel, Illinois Department of Revenue

Hear the latest updates for 2014 from Illinois Department of Revenue experts and understand how to respond effectively to upcoming changes.

**Key Takeaways:**

- 2015 Electronic Commerce Filing Season updates  
- Current news on the Independent Tax Tribunal and Civil Union Tax Returns  
- Amnesty double interest

2:20 pm – 3:35 pm

Current Topics & Best Practices: Examination Panel

1.5 Taxation

**Speakers:** Annette Jones, CPA, MBA, Midwest Area Territory Manager, Chicago 2, Internal Revenue Service  
Steven Craig, EA, Partner, Larry J. Wolfe, LTD

The session will provide an overview of the latest changes in Exam Programs, Priorities and Procedures. Gain an understanding of how tax professionals can work together with the IRS to resolve issues in tax examinations.

**Key Takeaways:**

- Current IRS priorities along with Taxpayer Rights on new changes in Pub. 1  
- Breakdown of IRS Examination Procedures

3:35 pm – 3:50 pm  N E T W O R K I N G  B R E A K
Current Topics & Best Practices: Collection Panel

1 Taxation

**Speaker:** Timothy Sherrill, CPA, Midwest Area Director-Collection, Internal Revenue Service
Stan Green, CPA, Partner, Larry J. Wolfe, LTD

Learn how to respond to IRS notices and how to protect your client’s rights during the collection process. Walk away with an understating of how IRS collection expense standards affect case resolution.

**Key Takeaways:**

- Latest developments in Taxpayer’s Rights
- The importance of responding to IRS notices in a timely manner
- IRS expense standards when securing an installment agreement or Currently Not Collectable status

**Special Thanks to Our Task Force and Sponsors:**

**Symposium Chair:** Michael Singer, CPA, Founder and President, Michael Singer & Co.

**Event Sponsors:**

- Illinois CPA Society
- 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

<table>
<thead>
<tr>
<th>Date</th>
<th>Location</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>September 18</td>
<td>Oakbrook Terrace</td>
<td>Financial Institutions</td>
</tr>
<tr>
<td>September 23</td>
<td>Chicago</td>
<td>Midwest Financial Reporting Symposium</td>
</tr>
<tr>
<td>October 22</td>
<td>Rosemont</td>
<td>Manufacturing NEW!</td>
</tr>
<tr>
<td>October 28</td>
<td>Chicago</td>
<td>Fraud &amp; Forensic Symposium</td>
</tr>
<tr>
<td>October 30</td>
<td>Oakbrook Terrace</td>
<td>Construction Industry</td>
</tr>
<tr>
<td>November 12</td>
<td>Des Plaines</td>
<td>Tax</td>
</tr>
<tr>
<td>November 14</td>
<td>Chicago</td>
<td>Technology Symposium NEW!</td>
</tr>
<tr>
<td>November 19</td>
<td>Rosemont</td>
<td>Healthcare Compliance &amp; Fraud Half-Day</td>
</tr>
<tr>
<td>November 20</td>
<td>Rosemont</td>
<td>Not-for-Profit</td>
</tr>
<tr>
<td>December 2</td>
<td>Chicago</td>
<td>Advanced Topics in Flow-Through Taxation Half-Day</td>
</tr>
<tr>
<td>December 3</td>
<td>Springfield</td>
<td>Accounting &amp; Auditing</td>
</tr>
<tr>
<td>December 4</td>
<td>Rosemont</td>
<td></td>
</tr>
<tr>
<td>December 9</td>
<td>Rosemont</td>
<td>Employee Benefits</td>
</tr>
<tr>
<td>December 11</td>
<td>Springfield</td>
<td>Not-for-Profit</td>
</tr>
</tbody>
</table>
Tuesday, October 21, 2014 | Rosemont, IL

IRS/Tax Practitioners Symposium

Special Thanks to our Symposium Sponsor:

IRS

Enhancing the value of

the CPA profession.