

2017

IRS/Practitioners Forum

Cosponsored by: Oregon Society of Certified Public Accountants • Internal Revenue Service • Oregon Association of Independent Accountants • Oregon Association of Tax Consultants • Oregon Society of Enrolled Agents • Oregon Society of Tax Consultants • Oregon State Bar Association

Monday, October 23, 2017 • Oregon Convention Center • Portland, Oregon



Developed by the OSCPA IRS/Practitioners Forum Project Committee

Highlights: What You Need to Know About Practicing Before the IRS * IRS Collections * IRS Exam Campus Operations * Practitioner Data Breaches * IT Security Protections EVERY Business Must Have In Place * Tax Tidbits



Oregon Society of
Certified Public Accountants

Schedule

Monday, October 23, 2017

- 7:15 a.m. *Registration Opens*
- 8:00 a.m. *Welcome & Opening Remarks*
Brian Wozniak, 2017-18 IRS/Practitioners Forum Project Committee Member
- 8:05 a.m. **What You Need to Know About Practicing Before the IRS**
Stephen Whitlock, Director, Office of Professional Responsibility
Internal Revenue Service, Washington, D.C.
- 9:45 a.m. *Refreshment Break*
- 10:00 a.m. **IRS Collections**
Michelle Alvarado, Director, Collection Inventory Delivery and Selection (CIDS)
Internal Revenue Service, Mesa, Arizona
- 11:00 a.m. *Refreshment Break*
- 11:15 a.m. **IRS Exam Campus Operations**
Ivy McChesney, Director, Examination – Campus Operations
Internal Revenue Service, Ogden, Utah
- 12:15 p.m. *Luncheon*
- 1:15 p.m. **Practitioner Data Breaches**
Shari Kay Scoles, CPA
Hoots, Baker & Wiley, P.C., Salem, Oregon
- Brian Wozniak, Senior Tax Specialist
Internal Revenue Service, Portland, Oregon
- 2:30 p.m. *Break*
- 2:45 p.m. **IT Security Protections EVERY Business Must Have In Place**
Chris Benson, CEO
AlwaysOnIT, Hillsboro, Oregon
- 3:30 p.m. **Tax Tidbits**
John Blakeman, Stakeholder Liaison NW Area
Internal Revenue Service, Portland, Oregon
- Brian Wozniak, Senior Tax Specialist
Internal Revenue Service, Portland, Oregon
- 4:45 p.m. *Closing Remarks & Conference Adjourns*
Brian Wozniak, 2017-18 IRS/Practitioners Forum Project Committee Member

In case of unforeseen circumstances, speakers and topics are subject to change.

Registration

Event: #09910 • **CPE:** 8 hours • **Level:** 4 (Update)

PTIN Credit: *The program will be submitted to the IRS Return Preparer Office requesting continuing education credit (CE) for Enrolled Agents and tax return preparers.*

Registration Options:

1. **WEB:** orca.org/cpe-oscpe-events/events-catalog
2. **FAX** Registration form and credit card to: 503-626-2942
3. **MAIL** Registration form & payment to: OSCP, PO Box 4555, Beaverton, OR 97076-4555
4. **QUESTIONS:** Contact OSCP at 503-641-7200 / 800-255-1470, ext. 3
5. Website: orca.org / Email: profdev@orca.org

Taxpayer Advocate Problem Solving Day – Bonus Session!

Does your client have a problem case they have not been able to resolve through normal IRS channels? Do you have clients with unresolved tax issues who are experiencing a significant hardship? This is your opportunity to speak with a local Case Advocate from the Taxpayer Advocate Service (TAS). Sign up for this bonus session by October 9 to be entered in the lottery for an in-person, private one-on-one 30 minute session with TAS to look at your case. Space is limited, not all participants are guaranteed a meeting.

Yes, I am interested in scheduling a one-on-one meeting with TAS on 10/23 during the conference.*

*NOTE: Time spent with TAS will not count towards your continuing education hours since you will be absent from the conference session.

Fee: \$135 if paid by 10/2/2017; \$150 thereafter

Please Check One:

- Oregon Society of CPAs Member (OSCP)
- Oregon Association of Independent Accountants Member (OAIA)
- Oregon Association of Tax Consultants Member (OATC)
- Oregon Society of Enrolled Agents Member (ORSEA)
- Oregon Society of Tax Consultants Member (OSTC)
- Oregon State Bar Association Member (OSB)
- Internal Revenue Service (IRS)
- Other: _____

Name as registered with the IRS: _____

PTIN Number: _____

LTC / LTP Number: _____

This program will be submitted to the IRS Return Preparer Office requesting Continuing Education credit (CE) for Enrolled Agents and other tax return preparers.

Registration includes:

Conference materials, refreshment breaks and luncheon. Vegetarian and special dietary needs available – 5 days advance notice required.

Special Needs: _____

Dietary Needs: _____

I would like this dietary request for all OSCP events.

Cancellation / No-Show Policy: Cancellations received 8 or more days prior to the conference will incur no penalty. Cancellations received 7 or fewer days prior to the event will be charged a \$25.00 cancellation fee or, without penalty you may **at the time of cancellation:** 1) send a substitute; or 2) transfer your registration to another event of your choice. Registration fees can be transferred anytime prior to the event date and will incur no penalty. Requests for refund or transfer on or following the event date cannot be honored.

Policies & Guidelines: For a complete listing, including the recording policy, refer to the OSCP Professional Development Catalog for Policies & Guidelines or see our website at orca.org/professional_development/policies.

Name: _____

Business: _____

Address: _____

City: _____

State: ____ Zip: _____ Phone: _____

Email: _____

Check for: _____ payable to OSCP

Please update my contact information.

Check One: Visa Mastercard

AMEX Discover

Check One: Business Card

Personal Card

Card #: _____

Amount Paid: _____

Expiration date: _____

Signature: _____



OSCPA
 PO Box 4555
 Beaverton, OR 97076-4555

2017 IRS/Practitioners Forum

Monday, October 23, 2017
 Oregon Convention Center
 777 NE Martin Luther King Jr. Blvd
 Portland, OR 97232

Conference Parking and Validation

Parking will be validated when parking at the Oregon Convention Center underground parking structure.



Oregon Society of CPAs IRS/Practitioners Project Committee

A special thanks to the following committee members who participated in the planning of the 2017 IRS/Practitioners Forum.

- Mark W. Rose, *Chair*
- John W. Blakeman
- Michael Davidson
- Mark L. Huglin
- Ronald D. Johanesen
- Dale Marino
- Jennifer O'Halloran
- Sue Robertson
- Carol Sandberg
- Carol Wild
- Brian P. Wozniak

OSCPA Administration

Yasmine Cerciello, Conference Manager
 Kara Lewis, Director, Member Services & Professional Development