



IRS SOLUTIONS CONFERENCE

December 6, 2017

GSCPA Learning Center

Atlanta, Georgia

Event Code: 13090,  LS13090



The Georgia Society
of CPAs

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IRS SOLUTIONS
CONFERENCE

The Georgia Society
of CPAs




Six Concourse Parkway
Suite 800
Atlanta, GA 30328

IRS SOLUTIONS CONFERENCE

December 6, 2017 | Event Codes: 13090,  LS13090

GSCPA Learning Center | Atlanta, Georgia

8 hours of CPE credit | 6.7 hours of CLE credit (applied for)



As the IRS focuses on increasing the quantity of audits performed, it's more important than ever for you to be knowledgeable and prepared to work with the IRS in a variety of situations. The IRS Solutions Conference will provide you with functional tools and an understanding of what the IRS is currently focusing on. Leading these discussions are experts in handling IRS issues including CPAs and attorneys.

Who Should Attend: CPAs at all levels of experience in public practice, as well as business and industry. Whether you represent clients on a regular basis, or are the CFO of a company, knowing how to work with and respond to the IRS in an array of situations is critical.

FACILITY

The Georgia Society of CPAs Learning Center

Six Concourse Parkway, Suite 800, Atlanta, Georgia 30328

404-231-8676 | 800-330-8889

Directions: www.gscpa.org/content/ContinuingEducation/travelinfo.aspx

HOTEL

The Westin - Perimeter North

Seven Concourse Parkway NW, Atlanta, Georgia 30328 | 770-395-3900

Rate: \$152 | Corporate Account Number: 309348

Website: <http://bit.ly/WestinAtlantaGSCPA>


SPECIAL THANKS TO

Art Auerbach, CPA, CGMA and Colin Blalock, CPA, CGMA, CFP®
for their support of this program.

LIVE STREAM ATTENDANCE

Event Code:  LS13090 | CPE Credit: 8 hours | 6.7 hours of CLE credit (applied for)



Live stream allows you to attend the conference from your home or office. You view the sessions in real time as part of the audience and have interaction with other attendees via chat areas. Live streamed sessions are indicated with this symbol: 

For more information or to register, visit www.gscpa.org or call 404-504-2985 or 800-330-8889, Opt. 3.

PROGRAM SCHEDULE

7:15 - 8 a.m.

Registration/Continental Breakfast

8 - 8:05 a.m.

Welcome and Announcements

8:05 - 9:30 a.m.

A - Dealing with The IRS Now and in the Future

Art Auerbach, CPA, CGMA, Atlanta, Ga.

Discuss what budget cuts will mean for service to the practitioner community and to taxpayers. Increased use of electronic communications; using the “secure portal” to obtain services from the IRS; and greater emphasis on practitioner enforcement by Office of Professional Responsibility. Review some of their efforts regarding conflicts of interest, cybersecurity efforts, and how that will affect the way we are dealing with the IRS, including virtual conferencing for answers to questions and perhaps examinations and Appellate conferences. The new IRS is not what we may be accustomed to and we will have to learn to adjust.

9:30 - 9:45 a.m.

Break

9:45 - 10:35 a.m.

B - What is the Definition of Contemporaneous Records and Are There any Timesavers?

Cecily V. Welch, CPA, CFP®, PFS,

Welch Financial Advisors, LLC, Atlanta, Ga.

We tell clients they’re responsible for maintaining records and substantiating expenses. Are we diligent in explaining what we mean? Do we stop when they say, “If I’m audited, I can get it.”? Let’s understand what contemporaneous records mean, and if our tax software accomplishes some of the requirements for us.

10:35 - 10:45 a.m.

Break

10:45 - 11:35 a.m.

C - Understanding the New Partnership/LLC

Audit Rules

Deborah L. Priest, CPA, Windham Brannon, PC, Atlanta, Ga.

The Bipartisan Budget Act of 2015 repealed the TEFRA audit rules and enacted new rules for partnership audits effective for tax years beginning after 2017. The new rules change how partnership audits are conducted, as well as how tax and penalties are assessed against the partners. While focusing on providing a basic overview of the new audit procedures, discuss changes that partnerships may wish to make to their partnership agreements to reduce the impact of the new rules in the event of an audit.

11:35 a.m. - 12:15 p.m.

Lunch

12:15 - 1:30 p.m.

D - The Unagreed Case from a CPA Standpoint and The New Appeal Process from an Attorney’s Point of View

Colin E. Blalock, CPA, CGMA, PFS, CFP®,

Jones and Kolb, CPAs, Atlanta, Ga.

Robert B. Gardner, III, Esq.,

Taylor English Duma LLP, Atlanta, Ga.

Explore how a CPA should approach an unagreed IRS examination in a professional manner, as the taxpayer’s advocate, and prepare the case for Appeals and/or tax court. Once the attorney is involved, discuss the progression of the case and describe the role of the attorney, the CPA and the taxpayer.

1:30 - 1:40 p.m.

Break

1:40 - 2:45 p.m.

E - The Anatomy of an IRS Examination from an IRS Agent’s Viewpoint

O’Daniel Outlaw, CPA, Conyers, Ga.

Discuss initiation of the audit, the planning of the audit, taxpayer contact, the appointment, the initial review, the overview of books and records, specific documentation requested, the analysis of the documentation, the closing conference, proposed changes and explanation of taxpayers’ options.

2:45 - 3 p.m.

Break

3 - 4:15 p.m.

F - Where Does Tax Reform Stand: Q&A Panel

Colin E. Blalock, CPA, CGMA, PFS, CFP®,

Jones and Kolb, CPAs, Atlanta, Ga., Moderator

Art Auerbach, CPA, CGMA, Atlanta, Ga.

Robert B. Gardner, III, Esq.,

Taylor English Duma LLP, Atlanta, Ga.

O’Daniel Outlaw, CPA, Conyers, Ga.

Deborah L. Priest, CPA, Windham Brannon, PC, Atlanta, Ga.

Cecily V. Welch, CPA, CFP®, PFS,

Welch Financial Advisors, LLC, Atlanta, Ga.

A panel discussion focusing on actual examples of IRS examinations, issues incurred and the corrected actions taken, including an analysis of what transpired. The panel will address live cases the participants are encountering and recommendations from the panel on the best approach to mitigate the negative impact. Topics covered will include working with an unreasonable agent, request to extend the statute, and challenges to documentation due to (1) fact, (2) law, (3) documentation, or (4) timelines.

REGISTRATION

Event Code: 13090

Name MI Last Member #

Company/Firm Name

Address City State Zip

Phone Fax Email

Registration Confirmation: Mail **OR** Email

Check here if registration includes a change of address:

PRICING INFORMATION

	Members	Nonmembers	LIVE STREAM Members	LIVE STREAM Nonmembers
Early Registration Fee by November 15	<input type="checkbox"/> \$270	<input type="checkbox"/> \$370	<input type="checkbox"/> \$270	<input type="checkbox"/> \$370
Standard Registration Fee	<input type="checkbox"/> \$330	<input type="checkbox"/> \$430	<input type="checkbox"/> \$330	<input type="checkbox"/> \$430
Late Registration Fee after December 1	<input type="checkbox"/> \$370	<input type="checkbox"/> \$470	<input type="checkbox"/> \$370	<input type="checkbox"/> \$470

Cancellation Policy: Cancellations/Transfers made up to three weeks before the seminar or conference will not incur an administration fee. Cancellations/Transfers made during the Standard Fee time frame are subject to a \$50 administration fee. Cancellations/Transfers made within three business days are subject to a \$100 administration fee for members; \$150 for nonmembers. *Cancellations/No shows on the date of the event forfeit the entire registration fee. No refunds or transfers of course fee will be made after the date of the event.*



MATERIALS

Choose how you wish to receive conference materials

- Download eMaterials **No printed materials provided**
 Printed Materials **Will receive printed materials**

Live Stream Attendees will receive eMaterials

ITEMS TO NOTE

If you have a specific dietary or other need, please contact the CPE Department at least one week prior to the conference at 404-504-2985 or 800-330-8889, Opt. 3.

If you have special needs under the Americans with Disabilities Act, please attach a written description or call 404-504-2985 or 800-330-8889, Opt. 3.

PAYMENT INFORMATION

In Person Attendance **OR** LiveStream Attendance

- Use Money on Account
 Check for \$_____ made payable to The Georgia Society of CPAs
 Amount to charge credit card \$_____
 Personal Card **OR** Company Card
 Discover MasterCard AmEx Visa

Card Number Expiration Date

Name as it appears on card

Signature

REGISTER TODAY!

ONLINE registration available at www.gscpa.org

CALL GSCPA CPE Department at 404-504-2985 or 800-330-8889, Opt. 3 to place a credit card order

MAIL your completed registration with credit card information or check made payable to The Georgia Society of CPAs to:
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