

# 2024



# IRS Nationwide Tax Forum

Please use this Schedule-at-a-Glance to help plan your day of seminars. The seminars are listed under the time they will be held at each location. Seminar room assignments will be available on site in your registration packet. Attending both seminars that are offered in English and Spanish will result in only earning one CE credit.

**PLEASE NOTE:** This document is for planning purposes only. Seating is available on a first-come, first-served basis only.



## Tuesday

### 8:00 am – 8:50 am

- Steering Clear of Mistakes - A Review of Refundable Credits Eligibility Rules **34** **T** **2**

- Tax Professional's Guide to Understanding the Importance of Properly Substantiating Business Expense Deductions **36** **T** **2**

- Cybersecurity for Tax Professionals **12** **T** **2**

- Tax Return Examinations Happen; Can You Represent Your Client? **38** **T** **2**

- Taxation of U.S. Citizens and Resident Aliens (Green Card Holders) Living Abroad **39** **T**

### 9:05 am – 9:55 am

- Tax Law Changes for TY2024 **35** **U**

- Disasters and the Secure 2.0 **14** **U**

- Criminal Investigation's Role in Understanding Refund Fraud **11** **T**

- Statutes - Protecting Your Clients' Rights and Making Sure the Assessment Periods are Calculated Correctly **33** **T**

- Discussion of International Tax Forms with Emphasis on FATCA/FBAR Reporting Requirements **15** **T**

### 10:10 am – 11:00 am

- Circular 230 and the Lifecycle of a Practitioner Practicing Before the IRS **8** **E**

- Digital Assets: What Tax Pros Should Know **13** **T** **2**

- Cybersecurity for Tax Professionals **12** **T** **2**

- Managing the IRS Examination **26** **T**

- Tax-Exempt Organizations, Charities, and Nonprofits Update **40** **T** **1**

### Lunch/NTF Expo

#### 1:30 pm – 2:20 pm

- Keynote Address **24** **U** **1**

#### 2:45 pm – 3:35 pm

- Digital Assets: What Tax Pros Should Know **13** **T** **2**

- Tax Pros and Security: Real-life Threats and Steps to Protect Your Business **37** **T**

- 1099-K, 1099-C and 1099-A Reporting for 2024 **1** **U**

- International Tax Essentials: Reporting Global Income in the United States **21** **T**

- Choosing a Retirement Plan in a SECURE 2.0 World **7** **U**

#### 3:50 pm – 4:40 pm

- Circular 230: Professional Responsibility in Today's Tax Practice **9** **E**

- Tax Professional's Guide to Understanding the Importance of Properly Substantiating Business Expense Deductions **36** **T** **2**

- IRS Security Summit and the Written Information Security Plan **22** **T**

- New Online Features for Tax Pros: Do Business Faster and Easier with IRS Online **29** **T**

- How Federal and State Tax Agencies Work Together to Create a Seamless Experience **19** **T**

## Wednesday

### 8:00 AM – 8:50 AM

- New Clean Vehicle Credits Resulting from the Enactment of the Inflation Reduction Act of 2022 for Section 30D and Section 25E **28** **T**

- New Online Features for Tax Pros: Do Business Faster and Easier with IRS Online **29** **T**

- Disasters and the Secure 2.0 **14** **U**

- Managing the IRS Examination **26** **T**

- Discussion of International Tax Forms with Emphasis on FATCA/FBAR Reporting Requirements **15** **T**

### 9:05 am – 9:55 am

- E-Services and You **16** **T** **2**

- Choosing a Retirement Plan in a SECURE 2.0 World **7** **U**

- Basis of an Entity – S Corporation vs. Partnership, including LLCs **5** **T**

- Criminal Investigation's Role in Understanding Refund Fraud **11** **T**

- How Federal and State Tax Agencies Work Together to Create a Seamless Experience **19** **T**

### 10:10 am – 11:00 am

- Circular 230 and the Lifecycle of a Practitioner Practicing Before the IRS **8** **E**

- Taxation of U.S. Citizens and Resident Aliens (Green Card Holders) Living Abroad **39** **T**

- Tax Return Examinations Happen; Can You Represent Your Client? **38** **T**

- 1099-K, 1099-C and 1099-A Reporting for 2024 **1** **U**

- Enhancing Equal Access **18** **T**

### Lunch/NTF Expo

#### 1:00 pm – 1:50 pm

- IRS Transformation and the Future Vision of the Agency **23** **T** **1**

#### 2:15 pm – 3:05 pm

- Tax Law Changes for TY2024 **35** **U**

- Mastering IRS Authorizations with Forms 2848 and 8821 **27** **T**

- Tax Pros and Security: Real-life Threats and Steps to Protect Your Business **37** **T**

- Statutes - Protecting Your Clients' Rights and Making Sure the Assessment Periods are Calculated Correctly **33** **T**

- The Taxpayer Experience with IRS Independent Office of Appeals **41** **T**

#### 3:20 pm – 4:10 pm

- Circular 230: Professional Responsibility in Today's Tax Practice **9** **E**

- E-Services and You **16** **T** **2**

- International Tax Essentials: Reporting Global Income in the United States **21** **T**

- IRS Security Summit and the Written Information Security Plan **22** **T**

- Retirement Plans and IRAs: Distribution and Repayment Options Under SECURE 2.0 **32** **U**

## Thursday

### 8:00 am – 8:50 am

- New Clean Vehicle Credits Resulting from the Enactment of the Inflation Reduction Act of 2022 for Section 30D and Section 25E **28** **T**

- Let's Chat about What You Need to Know about Transcripts and How We Might Improve Them **25** **T** **2**

- Best Practices for Responding to IRS Collection Notices **6** **T** **2**

- Basis of an Entity – S Corporation vs. Partnership, including LLCs **5** **T**

- What Taxpayers Need to Know about Disaster Tax Relief **43** **T** **2**

- Lo Que Puede Esperar en una Reunión con Agentes de Impuestos (*What to Expect When Meeting with Revenue Agents*) **44-S** **T** **1**

### 9:05 am – 9:55 am

- The ABCs of Due Diligence **2** **T** **2**

- Retirement Plans and IRAs: Distribution and Repayment Options Under SECURE 2.0 **32** **U**

- Abusive Tax Schemes and Fraud **3** **T** **2**

- Enhancing Equal Access **18** **T**

- Residential Energy and Clean Vehicle Credits **31** **U** **2**

- Cómo Entender y Revisar Avisos do Cobro (*Understanding and Reviewing Collection Notices*) **42-S** **T** **1**

### 10:10 am – 11:00 am

- Independent Contractor Vs. Employee Update **20** **T** **2**

- Partnerships and Non-resident Alien Withholding **30** **T** **2**

- Best Practices for Responding to IRS Collection Notices **6** **T** **2**

- Communicating With Your Client – The Importance of Engagement Letters for Small Firm Practitioners **10** **E** **2**

- What to Expect When Meeting with Revenue Agents **44** **T** **2**

- Circular 230 y el Ciclo de Vida de un Profesional Que Ejerce Ante el IRS (*Circular 230 and the Lifecycle of a Practitioner Practicing before the IRS*) **8-S** **E** **1**

### 11:15 am – 12:05 pm

- Employee Retention Credit Positions and Audits **17** **U** **2**

- Bark and Bite: How the IRS Watchdog Protects You from Fraud and Scams **4** **T** **1**

- Mastering IRS Authorizations with Forms 2848 and 8821 **27** **T**

- The Taxpayer Experience with IRS Independent Office of Appeals **41** **T**

- Understanding and Reviewing Collection Notices **42** **T** **2**

- Cómo Evitar los Errores – Una Revisión de las Reglas de Elegibilidad para los Créditos Reembolsables (*Steering Clear of Mistakes - A Review of Refundable Credits Eligibility Rules*) **34-S** **T** **1**

### Lunch

#### 1:30 pm – 2:20 pm

- Steering Clear of Mistakes - A Review of Refundable Credits Eligibility Rules **34** **T**

- What Taxpayers Need to Know about Disaster Tax Relief **43** **T** **2**

- Independent Contractor Vs. Employee Update **20** **T** **2**

- Communicating With Your Client – The Importance of Engagement Letters for Small Firm Practitioners **10** **E** **2**

- Cambios en la Ley Tributaria para el Año Tributario 2024 (*Tax Law Changes for TY2024*) **35-S** **U** **1**

### 2:35 pm – 3:25 pm

- Abusive Tax Schemes and Fraud **3** **T** **2**

- Residential Energy and Clean Vehicle Credits **31** **U** **2**

- Employee Retention Credit Positions and Audits **17** **U** **2**

- Partnerships and Non-resident Alien Withholding **30** **T** **2**

- Dominar las Autorizaciones del IRS con los Formularios 2848 y 8821 (*Mastering IRS Authorizations with Forms 2848 and 8821*) **27-S** **T** **1**

### 3:40 pm – 4:30 pm

- The ABCs of Due Diligence **2** **T** **2**

- Let's Chat about What You Need to Know about Transcripts and How We Might Improve Them **25** **T** **2**

- Understanding and Reviewing Collection Notices **42** **T** **2**

- What to Expect When Meeting with Revenue Agents **44** **T** **2**

Seminar Track **T** Federal Tax Law

**E** Ethics

**1** Offered one time only

**2** Offered two times on one day only

Symbol Key **U** Federal Tax Law Updates

The numbers in bold correlate with the presentation number and description of the 2024 NTF Seminar Topics listed online at [www.irstaxforum.com/seminars](http://www.irstaxforum.com/seminars) and in the NTF Forum Guide.

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