Tax Resolution Essentials
Intermediate Tax Resolution 200A
Live Course Agenda
August 23, 2017
8:00 a.m. – 4:30 p.m. (Pacific)

7:15 a.m. – 8:30 a.m.  **Morning Networking & Continental Breakfast @ TRI Headquarters**
Meet the featured speakers, Peter Y. Stephan, CPA and Norman J. Kreisman Esq. as well as network with your fellow attendees during an informal networking meeting over breakfast.

**Registration and Introductions**
You will receive your badge and seminar packet at this time.

8:30 a.m. – 11:50 a.m.  **Tax Resolution Training – Segment 1**
- Introduction to Tax Resolution
- Sequence of Events – case management, beginning to end

**Tax Resolution Training – Segment 2**
- IRS Powers of Attorney and Transcripts
- Payroll Tax - Trust Fund and Trust Fund Recovery Penalty
- Low Hanging Fruit 1
- Low Hanging Fruit 2

**Questions and Interactive Discussion**

**Tax Resolution Training – Segment 3**
- Installment Agreements
- Low Hanging Fruit 3

**Morning Break and Networking** – 15 Minute Break

**Tax Resolution Training – Segment 3 (Continued)**
- IRS National and Local Standards – including exceptions to the standards

**Tax Resolution Training – Segment 4**
- Installment Agreement – Case Study
- Success Stories
Questions and Interactive Discussion

Tax Resolution Training – Segment 5
- Criminal Investigation (CI)

Marketing Segment
- A brief look at Marketing

11:50 a.m. – 12:00 p.m.  **DRAWING - Giveaway Ultimate Professional System**  
(Seminar Attendees)

12:00 p.m. – 1:00 p.m.  Lunch Break

1:00 p.m. – 4:15 p.m.  Tax Resolution Training- Segment 6
- Offers in Compromise Overview
- Success Stories
- IA Case Study Revisited for Offer in Compromise
- OIC Vs. IA - Comparison

Sales Segment
- A brief look at Selling by Professionals

**DRAWING - Giveaway Ultimate Professional System**  
(Webinar Attendees)

Afternoon Break and Networking – 15 Minute Break

Tax Resolution Training – Segment 7
- Innocent Spouse
- Taxes and Bankruptcy
- Low Hanging Fruit 4
- Audits
- IRS Appeals

4:15 p.m. – 4:30 p.m.  Conclusion
- Questions and Interactive discussion (time permitting)