

**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)