

IRS Correspondence-Action and Reaction (3 CE's): Attendees will be shown actual Collections, Audit and Appeal letters, redacted for demonstration. The letters will be reviewed in detail so that attendees can learn how the IRS hides their own internal abbreviations within the correspondence. Most importantly, attendees will learn how to respond to all letters presented. We will run through an assessed tax right through collection action/levy notices. All attendees will receive a copy of the material, Power point will be used as a .PDF format to scroll through letters. Objectives: 1) To learn the IRS abbreviations listed on common Collection Letters 2) To discuss the process of Collection letters 3) To discuss how each Collection Letter fits into the client's case 4) To learn which letters are used by which Unit within the IRS 5) Follow a set of Collection letters from assessment to Levy or Installment Agreement and Appeals.

Representation 101 (3 CE's): Attendees will start with a POA F2848 and work our way through various IRS letters, collection forms and how to react. We will look at how to read IRS Transcripts of Account. What are the differences between how to negotiate with a RO or ACS? Also, attendees will be given "Marc's EA Collection Package" of useful practice forms/guides.

When the RO Says "NO!" (2 CE's): Medium Level Collections. When Collections conflicts arise during the negotiations with a Revenue Officer. When it is appropriate and how to Appeal with a CAP or CDP. Case studies of actual cases.

What is the Correct Streamlined Installment Agreement Payment Amount (2 CE's): Basic to Medium Level Collections. We review 4 cases with increasing amounts owed to the IRS for the purpose of Streamlined Installment Agreement Negotiations. Streamlined IA's account for a significant number of case resolutions, therefore, we do not cover advanced financial analysis in this class.

Injured Spouse VS Innocent Spouse (2 CE's): The Basics and Collections - This course will demonstrate the difference between the two IRS forms; 8857 Innocent Spouse and 8379 Injured Spouse Allocation. For each form, we will review how the IRS processes the forms and reacts. For the 8857 Innocent Spouse Form, we will further review some basic techniques to defend the taxpayer. We will also review the pitfalls of a possible conflict of interest. We will use break out groups to learn when to use each. All attendees will receive a copy of the material,

Penalty Abatement Techniques 2019 (2 CE's): Attendees will be shown sample penalty abatement letters and review, if and when, penalty abatement is available to clients and be able to ask questions.

The Practical Side to a CDP Hearing (2 CE's): This is a "Street View", everyday man's guide to the Before, During and After of a Collection Due Process Hearing, form 12153 Guide. We will walk through the various "tickets in" to the CDP Hearing and the client's rights to a hearing. We will walk through an entire Appeal on a lien filing including how to file in the 12153 and the letters the IRS will send. OBJECTIVE: The Attendees will be taught the actual process and procedure behind the CDP Process. What does Appeals want (and when)? What will be and what will not be discussed at the Hearing? How long will the Hearing take? We will review how to prepare for the Hearing and what we should discuss with our clients. Simple questions will be answered like, "Should my client go to the Hearing?" "How long does the entire process take?"