

**Tax Resolution Essentials
Intermediate Tax Resolution 200A
Live Course Agenda**

June 21, 2016

8:00 a.m. – 4:30 p.m. (Pacific)

7:30 a.m. – 8:00 a.m.

Check-in

You will receive your badge and seminar packet including the textbook **The Ultimate Guide to Tax Resolution** at this time.

8:00 a.m. – 10:00 a.m.

Introductions

You will have a chance to meet the featured speaker **Peter Y. Stephan, CPA**, as well as network with your fellow attendees.

Tax Resolution Training

- Introduction to Tax Resolution
- Solving Income and Payroll Tax collection issues
- Sequence of Events – case management, beginning to end

Tax Resolution Training

- Payroll Tax - Trust Fund and Trust Fund Recovery Penalty
- Low Hanging Fruit

Questions and Interactive Discussion

Tax Resolution Training

- Introduction to Installment Agreements
- IRS National and Local Standards – including exceptions to the standards

Questions and Interactive Discussion

Tax Resolution Training

- Installment Agreement – Case Study 1
- Success Stories
- Innocent Spouse Relief
- Criminal Investigation (CI)

10:00 a.m. – 10:15 a.m.

Morning Break and Networking – Please return no later than 10:10 a.m.

10:15 a.m. – 11:50 a.m.

Michael Rozbruch – Sales and Marketing

The 5 Secrets to a Million Dollar Tax Resolution Practice

- Who is this for?
- Why do you need to learn this?
- What you are going to learn...

Michael Rozbruch – Sales and Marketing (Continued)

So what are the 5 secrets?

- #1 How to Generate Leads
- #2 How to Answer the phones
- #3 How to get them to show up
- #4 How to get prospects begging you to take their case
- #5 How to get paid in advance every time

How do you make this happen? You have 2 choices...

- The hard way – Trial and Error
- The easy way – Speed of Results

11:50 a.m. – 12:00 p.m. **Questions and Interactive Discussions**

12:00 p.m. – 1:00 p.m. **Lunch (Provided in Board Room) and Networking** – Please return no later than 12:50 p.m.

1:00 p.m. – 2:30p.m. **Tax Resolution Training**

- Low Hanging Fruit
- Offers in Compromise Overview
- Offers in Compromise - Case Study 2 (Part 1)
- IRS Form 433-A OIC
- Success Stories

Tax Resolution Training

- Offers in Compromise – Case Study 2 (Part 2)
- IRS Form 656
- Success Stories
- OIC Vs. IA – Comparison

2:30 p.m. – 2:45 p.m. **Afternoon Break and Networking** – Please return no later than 2:40 p.m.

2:45 p.m. – 4:15 p.m. **Tax Resolution Training**

- Taxes and Bankruptcy
- Audits

Questions and Interactive Discussion

- IRS Appeals
- Summary of Low Hanging Fruit

4:15 p.m. – 4:30 p.m. **Conclusion**

- Questions and Interactive discussion (time permitting)