

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

June 21, 2016 – 8:00 AM PDT  
(All Times in Pacific Daylight Time)

8:00 a.m. – 10:00 a.m.

**Introductions**

Welcome to Tax Resolution Essentials 200A – Intermediate Tax Resolution, meet our featured speaker, **Peter Y Stephan, CPA**

**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)