

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

September 6, 2017

8:00 a.m. – 4:00 p.m. (Pacific Time)

8:00 a.m. – 11:20 a.m.

**Introductions**

Welcome to Tax Resolution Essentials 200A – Intermediate Tax Resolution, meet our featured speakers, **Peter Y Stephan, CPA** and **Norman J. Kreisman, Esq.**

**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
- IRS National and Local Standards – including exceptions to the standards

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

**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

11:20 a.m. – 11:30 p.m. **DRAWING - Giveaway Ultimate Professional System**  
(Seminar Attendees)

11:30 p.m. – 12:30 p.m. **Lunch Break**

12:30 p.m. – 3:45 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

3:45 p.m. – 4:00 p.m.

### **Conclusion**

- Questions and Interactive discussion (time permitting)