



TaxForum | 2023

Tuesday

8:00 am – 8:50 am

- Sailing Through the Rules of Refundable Tax Credits **29 T F**
- SECURE Act of 2022: Things Tax Professionals Need to Know! **31 U F 2**

- Comingled 1099-K **11 T F**

- Form 4797, Sale of Business Property, Allocation of Sales Price and Tax Planning **16 T F**

- The New Schedules K-2 and K-3 and Form 1116, Foreign Tax Credit and Reporting Items from Schedule K-3 on Form 1040-NR, U.S. Nonresident Alien Income Tax Return **24 T F**

9:05 am – 9:55 am

- Tax Law Changes for TY2023 **34 U F**
- 1099-Q: What Do I Do? **3 T F**
- Cybersecurity for Tax Professionals **12 T F 2**

- Advocating for Taxpayers Working with the IRS in a Digital World **6 T F 2**

- Identity Assurance (IA)—Identity Verifications for Tax Professionals **17 T F**

10:10 am – 11:00 am

- Circular 230 and Ethics in Tax Practice: How You Can Stay Out of Trouble **10 E F**
- Taxable Transactions with Digital Assets **35 T F 2**
- Understanding and Combating Refund Fraud **39 T F**

- A Simple Approach and Overview to Virtual Currency **32 T F**

- Tax-Exempt Organizations, Charities, and Nonprofits Update **36 T F 1**

Lunch/NTF Expo

1:30 pm – 2:20 pm

- Keynote Address **20 U F 1**

2:45 pm – 3:35 pm

- Taxable Transactions with Digital Assets **35 T F 2**
- SECURE 2.0—What You Need to Worry About Now **30 U F**
- Cybersecurity for Tax Professionals **12 T F 2**

- Advocating for Taxpayers Working with the IRS in a Digital World **6 T F 2**

- Operating a Retirement Plan for the Do-It-Yourself Small Business Owner **25 T F**

3:50 pm – 4:40 pm

- A Potpourri of (Potentially Painful) Tax Professional Problems **26 E F**

- 1099-K: New Law Lowers Filing Threshold; What Does It Mean to Your Clients? **2 U F**

- SECURE Act of 2022: Things Tax Professionals Need to Know! **31 U F 2**

- Assist with Individual Taxpayer Identification Number (ITIN) Services; Become an Acceptance Agent **8 T F**

- Abusive Tax Avoidance Transactions **4 T F**

Wednesday

8:00 am – 8:50 am

- New and Improved \$25C and \$25D Credits for Taxpayers for Home Energy Credits as a Result of the Inflation Reduction Act of 2022 **23 U F**

- 1099-K **1 U F**

- 1099-Q: What Do I Do? **3 T F**

- Form 4797, Sale of Business Property, Allocation of Sales Price and Tax Planning **16 T F**

- Recent Developments in Foreign Withholding and Information Reporting **27 T F**

9:05 am – 9:55 am

- 1099-K: New Law Lowers Filing Threshold; What Does It Mean to Your Clients? **2 U F**

- Abusive Tax Avoidance Transactions **4 T F**

- Identity Protection **18 T F**

- SECURE 2.0—What You Need to Worry About Now **30 U F**

- Advocating for Taxpayers—How the Taxpayer Advocate Service Can Assist You and Your Clients **5 T F**

10:10 am – 11:00 am

- Circular 230 and Ethics in Tax Practice: How You Can Stay Out of Trouble **10 E F**

- Assist with Individual Taxpayer Identification Number (ITIN) Services; Become an Acceptance Agent **8 T F**

- Comingled 1099-K **11 T F**

- A Simple Approach and Overview to Virtual Currency **32 T F**

- Retirement Plan Distributions After SECURE 1.0 and SECURE 2.0 **28 U F**

Lunch/NTF Expo

1:00 pm – 1:50 pm

- IRS Strategic Operating Plan and Implementation **19 U F 1**

2:15 pm – 3:05 pm

- Tax Law Changes for TY2023 **34 U F**

- The New Schedules K-2 and K-3 and Form 1116, Foreign Tax Credit and Reporting Items from Schedule K-3 on Form 1040-NR, U.S. Nonresident Alien Income Tax Return **24 T F**

- Answers to Your Frequently Asked Questions About Due Diligence **7 T F**

- Update from the IRS Return Preparer Office: News You Can Use **40 T F**

- The Taxpayer Experience with IRS Independent Office of Appeals **37 T F**

3:20 pm – 4:10 pm

- A Potpourri of (Potentially Painful) Tax Professional Problems **26 E F**

- Identity Assurance (IA)—Identity Verifications for Tax Professionals **17 T F**

- Understanding and Combating Refund Fraud **39 T F**

- Operating a Retirement Plan for the Do-It-Yourself Small Business Owner **25 T F**

- Navigating the Collection Process **22 T F**

Please use this Schedule-at-a-Glance to help plan your day of seminars. The seminars are listed under the time they will be held at each location. Seminar room assignments will be available on site in your registration packet. **PLEASE NOTE:** This document is for planning purposes only. Seating is available on a first-come, first-served basis only.

Thursday

8:00 am – 8:50 am

- New and Improved \$25C and \$25D Credits for Taxpayers for Home Energy Credits as a Result of the Inflation Reduction Act of 2022 **23 U F**

- Identity Protection **18 T F**

- Tax Issues Applicable to Recent Immigrants **33 T F 2**

- Foreign Gift and Trust Reporting on Forms 3520 and 3520-A **15 T F 2**

- Navigating the Collection Process **22 T F**

9:05 am – 9:55 am

- 1099-K **1 U F**

- Recent Developments in Foreign Withholding and Information Reporting **27 T F**

- Advocating for Taxpayers—How the Taxpayer Advocate Service Can Assist You and Your Clients **5 T F**

- Don't Tell Anyone But...Ethical Standards Surrounding Confidential Client Information **13 E F 2**

- Answers to Your Frequently Asked Questions About Due Diligence **7 T F**

10:10 am – 11:00 am

- Challenging Information Returns **9 T F 2**

- The Taxpayer Experience with IRS Independent Office of Appeals **37 T F**

- What You Need to Know About the Information Returns Intake System **41 U F 2**

- Update from the IRS Return Preparer Office: News You Can Use **40 T F**

11:15 am – 12:05 pm

- Employee Retention Credit Positions and Audits **14 T F 2**

- Foreign Gift and Trust Reporting on Forms 3520 and 3520-A **15 T F 2**

- Tax Issues Applicable to Recent Immigrants **33 T F 2**

- Navigating Fraud Landmines as Tax Professionals **21 T F 2**

Lunch

1:30 pm – 2:20 pm

- TIGTA's Role in Protecting the Integrity of Tax Administration **38 T F 1**

- Retirement Plan Distributions After SECURE 1.0 and SECURE 2.0 **28 U F**

- Challenging Information Returns **9 T F 2**

- Don't Tell Anyone But...Ethical Standards Surrounding Confidential Client Information **13 E F 2**

2:35 pm – 3:25 pm

- Navigating Fraud Landmines as Tax Professionals **21 T F 2**

- What You Need to Know About the Information Returns Intake System **41 U F 2**

- Employee Retention Credit Positions and Audits **14 T F 2**

- Sailing Through the Rules of Refundable Tax Credits **29 T F**

Seminar Track
Symbol Key

T Federal Tax Law

E Ethics

1 Offered one time only

U Federal Tax Law Updates

F Certified Financial Planner

2 Offered two times on one day only

The numbers in bold correlate with the presentation number and description of the 2023 NTF Seminar Topics listed online at www.irsforum.com/Seminars and in the NTF Forum Guide.

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