

Special Offer!

Bring a Colleague
and Save \$100!

Learn, Implement and Succeed. Register Today!

IRS Form 1099 Reporting: What You Need to Know

Seattle, WA • December 6, 2013

Faculty

Kara Backus, Lane Powell PC

Howard J. Choder, E.A., Taxman.cc, Inc.

Craig A. Day, Lane Powell PC

Traci Fahnlander, BenefitMall

Satoko S. Valdes, Moss Adams LLP

For more information about our speakers, go to www.lorman.com/ID391787.

The 1099 forms are confusing ... walk through the 1099 series of forms with ease.

Independent contractors save your business money, but increasing IRS scrutiny can put you at risk. Fail to meet *all* the 1099 filing requirements, and you may land in a hotbed of penalties. With a maze of 1099 forms, and confusing and ever-changing IRS reporting guidelines, mastering the 1099 can be a daunting task for any business.

Attend this informative seminar and sharpen your 1099 savvy. Develop better, more accurate reporting skills – keep your business audit-ready and in compliance. Determine a worker's status without hesitation – every time – and stay current and in the clear.

Benefits for You

- Navigate payments to non-U.S. individuals with confidence
- Tackle your 1099-MISC questions
- Pinpoint when to issue a W-2 or 1099 form
- Confidently correct errors – subdue even the toughest filing mistakes

Continuing Education Credit



- CPP/FPC 6.50
- CAC 1.0
- CFP 8.0
- Enrolled Agents 8.0
- CPE 8.0

Learning Objectives

- You will be able to describe the different types of 1099s.
- You will be able to discuss cross border issues.
- You will be able to explain Form 1099-MISC in detail.
- You will be able to review the difference between employee vs. independent contractor.

For more detailed CE credit information, visit us at www.lorman.com/ID391787
or contact us at 866-352-9540.



LORMAN[®]
EDUCATION SERVICES

Keeping You Current.™

Helping You Succeed.

Committed to Quality Continuing Education Since 1987

Seminar Agenda

8:00 AM - 8:30 AM

Registration

8:30 AM - 10:50 AM

Who Should Receive a Form 1099 and When Should It Be Issued?

— Howard J. Choder, E.A.

The Mechanics of 1099s: Filing With the Payor and With the IRS

- What's New?
- Electronic Reporting
- Due Dates
- Filing Thresholds
- Back-Up Withholding
- Common Mistakes to Watch for
- Penalties

Different Types of 1099s

- 1099-INT
- 1099-DIV
- 1099-K
- 1099-C
- 1099-R
- 1099-A: Acquisition or Abandonment of Secured Property

Common 1099 Questions

10:50 AM - 11:00 AM

Break

11:00 AM - 12:00 PM

Employee vs. Independent Contractor

— Traci Fahlander

- Why Proper Classification Is Important
- Key Factors in Proper Classification
- Practical Tips in Hiring Independent Contractors

12:00 PM - 1:00 PM

Lunch (On Your Own)

1:00 PM - 3:45 PM

(Break 2:20 PM - 2:30 PM)

1099-MISC

— Kara Backus and Craig A. Day

- Introduction to 1099-MISC Filing
- Terms to Understand
 - Nonemployee
 - Trade or Business
- 1099-MISC Preparation
- Withholding Requirements
- Correction of Errors

3:45 PM - 4:30 PM

Cross Border Issues

— Satoko S. Valdes

- Payments Made to the Foreign Persons
- Payments Subject to Withholding Tax
- Personal Services
- Treaties
- Forms 1042, W-8BEN, 8833

Presented By:

Kara Backus

- Attorney with Lane Powell PC
- Practices exclusively in the areas of employee benefits, executive compensation and tax
- Board member for the Portland Chapter of the Western Pension & Benefits Council; Significant Issues Chair

Howard J. Choder, E.A.

- Founding member of Taxman.cc, Inc., in Seattle
- Firm focuses on tax return preparation and financial planning; and focuses on clients needing assistance with IRS audits or collection matters
- Regularly appears on television and radio to comment on new tax legislation or current tax issues
- Involved in the tax field for more than 30 years
- Former IRS agent - worked 15 years for the IRS

Craig A. Day

- Counsel to the firm, Lane Powell PC
- Practices exclusively in the areas of employee benefits, executive compensation and tax; past practice at Deloitte includes advising employers on all aspects of tax information reporting, including IRS Form W-2 and Form 1099

Traci Fahlander

- Senior district manager of the Payroll Division for BenefitMall
- Over seven years of management experience and payroll sales experience
- President's Club winner, ADP
- Chairmains Circle winner, CompuPay
- Currently performing within the top 10% at CompuPay

Satoko S. Valdes

- Senior manager at Moss Adams LLP, focusing in international tax
- Former senior manager at Deloitte with Specializing Inbound International Corporations Tax Compliance and Consulting
- Manages over 200 inbound and outbound individual tax returns, tax equalization, gross-up calculations and pre-assignment consultations
- Frequent speaker for the Japan Business Association, Japan America Society and NWN Tax Seminars

For a complete list of accomplishments, visit www.lorman.com/ID391787.

Register at www.lorman.com/ID391787 or call 866-352-9539

Yes!
Sign
me up!

Special Offer!

Bring a Colleague
and Save \$100!

IRS Form 1099 Reporting

Seattle, WA • December 6, 2013 • Seminar ID: 391787

Purchase Options – Check All That Apply

- Yes!** I would like to attend – \$379 (includes free manual with attendance)
 Add a CD recording of this program – \$99*
 Bring a colleague – \$279 per each additional registrant

I am unable to attend, please send me:

- CD/Manual Package – \$399* Manual Only – \$139*

Amount Enclosed

\$ _____ Tuition Subtotal
 \$ _____ Shipping & Handling (\$8.95 first item, \$3.00 each additional)
 \$ _____ Sales Tax (If tax-exempt, please include your certificate.)
 \$ _____ TOTAL

*Add \$8.95 shipping & handling plus applicable sales tax to product orders.
 Please allow four to six weeks after the date of the seminar for delivery.

Payment Information

Total amount enclosed \$ _____
<input type="checkbox"/> Check enclosed payable to Lorman Education Services
<input type="checkbox"/> Charge to credit card __ AE __ MC __ VISA Signature _____
Card number _____ Exp. Date _____

Names of Attendees

PRIORITY CODE	DISCOUNT CODE	
NAME		
TITLE	EMAIL	
NAME		
TITLE	EMAIL	

Firm Information

FIRM NAME		
ADDRESS		
CITY	STATE	ZIP CODE
TELEPHONE	FAX	WEBSITE

Approving Manager

NAME	
TITLE	EMAIL

© 2013 Lorman Education Services. All rights reserved.

Save 25% on Your Registration When You Become a Member!

Lorman has partnered with Tax Professionals' Resource to offer a training and development website dedicated to accounting and taxation professionals. Stay up-to-date and informed about the latest law changes, regulation updates, trends and developments in the tax industry. Become a Silver member of Tax Professionals' Resource and receive 2 free live webinars, unlimited on-demand webinars and 25% off seminar registrations! All training is provided by Lorman, so it's the same high quality you've come to know and expect from a Lorman program. Annual membership is only \$425.

Join today and start saving immediately!

Visit www.lorman.com/ID391787 for more info!

How Do I Register?

EMAIL: customerservice@lorman.com
 WEBSITE: www.lorman.com/ID391787
 TELEPHONE: 866-352-9539
 FAX: 715-833-3953
 MAIL: Mail this form with payment to:
 Lorman Education Services
 Dept. 5382, P.O. Box 2933
 Milwaukee, WI 53201-2933

Where Is It?

Washington State Convention Center
 800 Convention Place
 Seattle, Washington
 206-694-5000

Who Should Attend?

This seminar is designed for accounts payable professionals, accountants, controllers, tax managers, tax preparers, enrolled agents, presidents, vice presidents, bookkeepers, CPAs and CFOs.

GENERAL INFORMATION:

- This seminar may be recorded by Lorman Education.
- If you need special accommodations, please contact us two weeks in advance of the program.
- Lorman Education Services is not approved to offer self-study CPE credit for accountants; therefore, no CPE will be given for this program if ordered as a self-study package.

CANCELLATIONS: Substitute registrants can be named at any time. A full refund, less a \$20 service charge, will be given if notification is given six or more business days in advance. Notification of less than six business days will result in a credit that can be applied to any Lorman products or services. If you do not cancel or attend, you are responsible for the entire payment.

The 1099 forms
are confusing ...
walk through the
1099 series of
forms with ease.

Register a Group and Save!

IRS Form 1099 Reporting:

What You Need to Know

Seattle, WA • December 6, 2013

Continuing Education Credit



- CPP/FPC 6.50
- CAC 1.0
- CFP 8.0
- Enrolled Agents 8.0
- CPE 8.0

For more detailed CE credit information, visit us at
www.lorman.com/ID391787 or contact us at 866-352-9540.

REGISTER AT WWW.LORMAN.COM/ID391787 OR CALL 866-352-9539

IRS Form 1099 Reporting:

What You Need to Know

Seattle, WA • December 6, 2013



LORMAN[®]
EDUCATION SERVICES

A DIVISION OF LORMAN BUSINESS CENTER, INC.

Keeping You Current. Helping You Succeed.[®]

Committed to Quality Continuing Education Since 1987

Register at www.lorman.com/ID391787 or call 866-352-9539