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## Attachment I: NPF IRS.gov Advertisement – Example from Previous Year<sup>1</sup>

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### NATIONAL PHONE FORUMS AND WEBINARS

- [Proper Worker Classification](#) - Phone Forum (May 20, 2009)

### LOCAL PHONE FORUMS AND WEBINARS

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**Meeting:** Proper Worker Classification

**Date(s):** May 20, 2009

**Time:** Various

**Location:** Your home or office

**Contact:** Glenn Gizzi; E-mail: [nationalphoneforum@irs.gov](mailto:nationalphoneforum@irs.gov)

**Event Information:** Learn about proper worker classification.

\*\*\*Event Material: [Proper Worker Classification](#) (PDF)

***This IRS phone forum is for:***

- Tax Professionals
- Small Business Employers
- Small Business Organizations
- Industry Partners

***Topics include:***

- Worker classification categories, employee vs. independent contractor
  - Categories of evidence for proper classification
    - Worker classification related forms
    - Treatment of corporate officers
    - Section 530 relief requirements

***Earn Continuing Professional Education credit:***

- Enrolled agents receive one CPE credit for a minimum of 50-minute participation from the start of the forum.
- Other tax professionals may receive credit if the phone forum meets your organizations or states CPE requirements.
  - To receive credit, register individually and use your PIN.
  - Call in using your individual phone line so your attendance can be verified.
- Look for your Certificate of Completion by e-mail approximately one week after the forum. If you have met all requirements, you will receive your certificate automatically; there's no need to follow up.

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<sup>1</sup> This advertisement message is intended as an example and will be updated with the actual date and title of the presentation.

If you and others in your office do not require a CPE certificate, please have only one person register on the group's behalf and use your speaker phone to dial in. This will maximize the number of lines available for other participants and help reduce costs.

**Sign up now (and no later than May 15, 2009)**

Select the time that works best for you. All times are Eastern daylight.

**CONFERENCE ACCESS CODE**

**140711** – 10:00 a.m. (EDT); 9:00 a.m. (CDT); 8:00 a.m. (MDT); 7:00 a.m. (PDT)

**311314** – 1:00 p.m. (EDT); 12:00 p.m. (CDT); 11:00 a.m. (MDT); 10:00 a.m. (PDT)

**719050** – 4:00 p.m. (EDT); 3:00 p.m. (CDT); 2:00 p.m. (MDT); 1:00 p.m. (PDT)

Register at the [AT&T TeleConference Services Web site](http://www.attevent.com) ([www.attevent.com](http://www.attevent.com)) by May 15, 2009.

Reservations are limited, so register at the earliest date possible. You will receive a

Personal Identification Number that you must use to join the conference.

If you have never registered with AT&T for a prior phone forum, you will first need to click on create a profile. If you require special accommodations (for example, Braille, large print or interpreter services) please contact Brian Finn at [nationalphoneforum@irs.gov](mailto:nationalphoneforum@irs.gov).

We will e-mail presentation materials on May 19, 2009. If you do not receive this e-mail by 2:00 p.m. on May 19, 2009, e-mail us at [nationalphoneforum@irs.gov](mailto:nationalphoneforum@irs.gov) to request the materials.

Dial in on May 20, 2009

Toll free: (800) 683-4564

Toll: (913) 312-2904

- Dial in at least 5 to 10 minutes before the scheduled time
  - Enter your access code, then the pound (#) sign
  - Enter your PIN, then the pound (#) sign
- Your line will be placed on hold until the conference begins

A question and answer period will follow the presentation. However, due to the public nature of the call, we will not be able to address specific client issues.

Questions? E-mail [nationalphoneforum@irs.gov](mailto:nationalphoneforum@irs.gov)

**Sponsored by:** IRS Small Business/Self-Employed, Communications, Liaison & Disclosure, Stakeholder Liaison Field

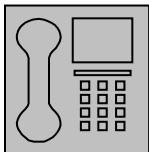
[Rate the Small Business and Self-Employed Web Site](#)

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## Attachment II: Talk Tax Today Advertisement – Example from Previous Year<sup>2</sup>

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**IRS Stakeholder Liaison presents:**



Phone Forum, May 20, 2009 **IRS Stakeholder Liaison presents:**

### **National Phone Forum**

#### ***Proper Worker Classification***

**Date:** May 20, 2009

**Cost:** **FREE**

**Location:** The convenience of your home or office

**This IRS phone forum is for**

- 1 Tax Professionals
- 2 Small Business Employers
- 3 Small Business Organizations
- 4 Industry Partners

**Learn about:**

- 1 Worker classification categories, employee vs. independent contractor
- 2 Categories of evidence for proper classification
- 3 Worker classification related forms
- 4 Treatment of corporate officers
- 5 Section 530 relief requirements

**Earn Continuing Professional Education credit**

- 1 Enrolled agents receive one CPE credit for a minimum of 50-minute participation from the start of the forum.
- 2 Other tax professionals may receive credit if the phone forum meets your organization's or state's CPE requirements.
- 3 To receive credit, register individually and use your PIN.
- 4 Call in using your individual phone line so your attendance can be verified.
- 5 Look for your Certificate of Completion by e-mail approximately one week after the forum. If you have met all requirements, you will receive your certificate automatically; there's no need to follow up.
- 6 If you and others in your office do not require a CPE certificate, please have only one person register on the group's behalf and use your speaker phone to dial in. This will maximize the number of lines available for other participants and help reduce costs.

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<sup>2</sup> This advertisement message is intended as an example and will be updated with the actual date and title of the presentation.

OMB Submission  
8/xx/09

2010 Nationwide Phone Forums/Webinars

*1 National Phone Forum, May 20, 2009 2*

**Sign up now (and no later than May 15, 2009)**

- Select the time that works best for you

**□ ALL TIMES ARE EASTERN DAYLIGHT**

| CONFERENCE ACCESS CODE | EASTERN        | CENTRAL       | MOUNTAIN       | PACIFIC        |
|------------------------|----------------|---------------|----------------|----------------|
| <b>140711</b>          | <b>10 a.m.</b> | <b>9 a.m.</b> | <b>8 a.m.</b>  | <b>7 a.m.</b>  |
| <b>311314</b>          | <b>1 p.m.</b>  | <b>Noon</b>   | <b>11 a.m.</b> | <b>10 a.m.</b> |
| <b>719050</b>          | <b>4 p.m.</b>  | <b>3 p.m.</b> | <b>2 p.m.</b>  | <b>1 p.m.</b>  |

## National Phone Forum

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## **Attachment III: NPF Enrollment Confirmation Notice Examples from Previous Years<sup>3</sup>**

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Thank you for registering to attend the Nationwide Phone Forum on Foreign Bank and Financial Account Reporting.

Conference Title: Foreign Bank Account Reporting (FBAR)

Moderator Name: Mary Marcotte, Stakeholder Liaison

This conference is scheduled to begin: Wednesday, June 20, 2007, 10:00 a.m. Eastern  
(9:00 a.m. Central, 8:00 a.m. Mountain, 7:00 a.m. Pacific)  
**Time zones shown are Daylight Savings Time.**

Conference dial-in number: Toll free: **1-866-216-6835**

Conference access code: **358400**

Participant PIN:

Participant information:

- Please dial in 3-5 minutes prior to conference start time.
- Enter your access code, followed by the pound (#) sign.
- Enter your Personal Identification Number (PIN), followed by the pound (#) sign.
- Your line will be placed on hold with music until conference start.

Our guest speakers will be Sheila Andrews, Stakeholder Liaison; Gary Watkins, Program Analyst, Bank Secrecy Act; and Elizabeth Witzgall, Senior Bank Secrecy Act Analyst.

Your Syllabus is attached below.

**Requirements:**

- Adobe Acrobat Reader must be installed on your computer to view/print the Acrobat files. You can download Adobe Reader from the following link:  
<http://www.adobe.com/products/acrobat/readstep2.html>
- Your e-mail client/program should be configured to view e-mails in HTML format instead of text so that your CPE Certificate of Completion will properly format.
- Your e-mail spam filter should be set to accept e-mail from [nationalphoneforum@irs.gov](mailto:nationalphoneforum@irs.gov).

**Note:** Enrolled Agents will be entitled to 1 CPE credit provided they participate in the phone forum for at least 50 minutes; other tax professionals may qualify depending on the requirements of their organizations. You must register individually and use your PIN to receive CPE credit. Each person must call in on a separate line so attendance can be verified.

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<sup>3</sup> This enrollment confirmation message is intended as an example and will be updated with the actual date and title of the presentation.

**Thank you for your interest and for attending our Nationwide Phone Forum. We invite you to participate in a short survey, which will allow you to provide comments, suggestions for improvement, recommendations for future topics and to voice your satisfaction with the program. The survey should only take 3 minutes to complete. Thank you in advance for your participation.**



## Phone Forum Syllabus

# Foreign Bank Account Reporting (FBAR)

**Forum Date: Wednesday, June 20, 2007**

**Forum Time: 10:00 a.m. EDT**

### Description and Learning Objectives:

Learn about FBAR and how it works:

- Combats the use of foreign financial accounts to circumvent U.S. Tax Law
- Requires U.S. taxpayers with certain foreign accounts to file TD F 90-22.1
- Provides leads to investigators to identify and trace funds used for illicit purposes

### Presentation Method and Instructor(s):

An IRS phone forum is an interactive learning experience with live instruction via conference call. This forum's instructors are:

- Gary Watkins, Program Analyst, Bank Secrecy Act – Gary has been in his current position since October 2005. He began his IRS career with the IRS in 1986 as a Revenue Agent assigned to the Compliance Enforcement Team. Previous to his current position, he was a Senior Tax Specialist in Taxpayer Education and Communication (TEC). Gary has a BS in Business Administration from The Citadel, Military College of South Carolina and an MBA from the University of Tennessee.
- Elizabeth Witzgall, Senior Bank Secrecy Act Analyst – Elizabeth has developed and instructed numerous classes on the Bank Secrecy Act from the mid 1990's to present, including several classes on FBAR. She was a presenter on FBAR during two IRS Video Teleconferences (2003 and 2004) and also assisted in the development of an FBAR DVD in 2004. She has a J.D. from Columbia University School of Law and is a member of the District of Columbia Bar Association.
- Sheila Andrews, Stakeholder Liaison – Sheila has been with the IRS for over 20 years. Her prior positions with the IRS include: Analyst in the

Taxpayer Advocate Service; Manager in the Customer Service Division, including several years as the Accounts Manager; Taxpayer Educational Specialist in the Volunteer and Education Program; and a Taxpayer Service Representative. She is a graduate of Purdue University and has completed graduate studies at Auburn University and College of Saint Frances.

### **Presentation Materials (to be sent in a separate e-mail):**

- Publication 4261, *Do You Have a Foreign Bank Account?*
- Power Point presentation (in PDF format) entitled *Report of Foreign Bank and Financial Accounts*
- Please note that all presentation slides are numbered. The instructors will be referring to slide numbers so that you can easily follow along.

### **Resources/Handouts:**

- [The Tax Gap](http://www.irs.gov/newsroom/article/0,,id=158619,00.html) is the difference between the amount of tax that taxpayers should pay and the amount that is paid voluntarily and on time. The tax gap can also be thought of as the sum of non-compliance with the tax law. To find more information on visit our Web site page at:  
<http://www.irs.gov/newsroom/article/0,,id=158619,00.html>.
- [Issue Management Resolution System \(IMRS\)](http://www.irs.gov/businesses/small/article/0,,id=158507,00.html) - The IRS Stakeholder Liaison (SL) function has established the Issue Management Resolution System (IMRS), a streamlined and structured process that facilitates stakeholder issue identification, resolution and feedback.  
(<http://www.irs.gov/businesses/small/article/0,,id=158507,00.html>)
- [Practitioner Local Liaison Meetings, Phone Forums and Seminars](http://www.irs.gov/businesses/small/article/0,,id=127801,00.html)  
(<http://www.irs.gov/businesses/small/article/0,,id=127801,00.html>)
- [Join e-News For Tax Professionals](http://www.irs.gov/newsroom/content/0,,id=164580,00.html)  
(<http://www.irs.gov/newsroom/content/0,,id=164580,00.html>)

**Point of Contact:** If you have questions, please contact Sheila Andrews at 317-685-7549, or e-mail [nationalphoneforum@irs.gov](mailto:nationalphoneforum@irs.gov).

**Evaluation:** Please send any comments or observations to [nationalphoneforum@irs.gov](mailto:nationalphoneforum@irs.gov).



## AT&T TeleConference Se

IT'S NEVER BEEN EASIER TO CALL A MEETING

Please **DO NOT REFRESH THIS PAGE**. Doing so will create a duplicate submission.

Below is your Personal Identification Number (PIN) needed to access the conference. When dialing into the conference, you will be asked to enter your Access Code and PIN.

**Name:** Lorraine Maguire

**PIN:** 5989

Here are the details for your AT&T Event Deluxe Service Conference:

Conference Name: 880587/ Form 1099 Info Reporti

**Access Code:** 749158

Toll-Free Phone: 1-866-216-6835

Toll Phone: 1-913-227-1220

**Next Conference Time:** 11/28/2007 at 4:00 PM

Conference Times: (*Shown in Eastern Time*)

- Wednesday, November 28, 2007, 4:00 pm for 60 minutes

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## Attachment IV: Event Evaluation Survey – Examples from Previous Year<sup>4</sup>

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OMB #1545-1432

### Internal Revenue Service

#### IRS Stakeholder Liaison

#### Event Evaluation

Name of Event: TBD

Date of Event: TBD

Time of Event: TBD

Name of Presenter(s): TBD

1. Where is your business or organization located? Select One

2. What (if any) professional organizations do you belong to? (Select all that apply)

AAA-CPA   ABA   AICPA   ALPFA   IPPA   NABA   None  
NAEA   NATP   NCCPAP   NSA   NSTP   Other

3. How did you learn about this event? Select One

**PLEASE CHECK ONLY ONE BOX PER QUESTION.**

For each question, please indicate your opinion by choosing a number from 1 to 5,  
"1" means "Very Dissatisfied" and "5" means "Very Satisfied."

| Please indicate your satisfaction with: |   | (1)<br>Very<br>Dissatisfied | (2)<br>Dissatisfied      | (3)<br>Neutral           | (4)<br>Satisfied         | (5)<br>Very<br>Satisfied |
|---|---|-----------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| 4                                       | The main presenter's knowledge on the subject matter discussed. | <input type="checkbox"/>    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 5                                       | The technical content of the presentation.                      | <input type="checkbox"/>    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 6                                       | The time set aside for you to ask questions.                    | <input type="checkbox"/>    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 7                                       | The overall QUALITY of the activity or event.                   | <input type="checkbox"/>    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 8                                       | Your overall SATISFACTION of the activity or event.             | <input type="checkbox"/>    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Any comments you would like to make regarding this presentation or any topics that you would like to see presented in future events please send to NationalPhoneForum@irs.gov.

#### **Paperwork Reduction Act Notice**

The Paperwork Reduction Act requires IRS to display an OMB Control Number on all approved information requests. About three minutes will be needed to complete this voluntary questionnaire. If you have any comments about the time estimate, or suggestions for simplifying the form please write to:

Internal Revenue Service  
Tax Products Coordinating Committee  
SE:W:CAR:MP:T:T:SP  
1111 Constitution Ave. NW  
Washington, DC 20224

*Thank you for completing the survey!*

Department of the Treasury – Internal Revenue Service

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<sup>4</sup> This event evaluation survey form is intended as an example and will be updated with the actual date and title of the presentation.

DRAFT

OMB #: xxxx-xxxx

# Internal Revenue Service

## Tax Exempt / Government Entities Government Entities (GE) Activity / Event Feedback Survey

The IRS is committed to delivering quality customer service. You can help in this important mission by answering the questions below. This voluntary survey takes less than three minutes to complete and your responses will be kept completely confidential.

### Instructions

Use a blue or black ink pen or No. 2 pencil only.  
All responses must be fully marked by filling in the bubbles.

Correct:  Incorrect:

### Location



|  |  |  |  |  |
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|--|--|--|--|--|

### Activity



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|--|--|--|--|--|

### Date



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|--|--|--|--|--|
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|--|--|--|--|--|

**1** For each of the following questions, please indicate your level of satisfaction by choosing a number from 1 to 5, where 1 means "Very Dissatisfied" and 5 means "Very Satisfied."

Very Dissatisfied **1** 2 3 4 5 Very Satisfied

Presenters' knowledge of the subject matter .....       
Opportunity for you to ask questions .....       
Instructions on how to get additional information or help .....       
Information you received met your expectations .....

**2** Please rate your satisfaction with the OVERALL QUALITY of the activity or event .....

Very Dissatisfied **1** 2 3 4 5 Very Satisfied

Please rate your OVERALL SATISFACTION with this activity or event .....

**3** How did you learn about this event? (choose all that apply)

IRS  
 Professional/Trade Organization  
 Friend/Associate  
 Employer  
 Internet  
 Media (Newspaper, Magazine, TV, Radio, etc.)  
 Other (specify below)

**4** Which of the following best describes you? (choose one only)

Issuer  External Tax Professional  
 Conduit Borrower  Government Entity Manager  
 Legal Counsel  Government Entity Employee  
 Investor  Internal Attorney or Accountant  
 Federal Agency  Other (specify)  
 Underwriter/Financial or Market Analyst

Please Specify Here 

**5** We would appreciate any comments you may have. Please print clearly.

Tell us if anything was particularly good or bad about this event, offering suggestions for improvement, or share any other thoughts:

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### Paperwork Reduction Act Notice

The Paperwork Reduction Act requires IRS to display an OMB Control Number on all approved information requests. About three minutes will be needed to complete this voluntary questionnaire. If you have any comments about the time estimate, or suggestions for simplifying the form, please write to:

Tax Form Committee  
Western Distribution Center  
Rancho Cordova, CA 95743-0001

*Thank you for completing the survey.*