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IRS Form 1099 Reporting: What You Need to Know

New York, NY • October 25, 2013

Faculty

Warren M. Bergstein, CPA

Adelman Katz & Mond LLP

Jack E. Gold, CPA

Adelman Katz & Mond LLP

For more information about our speakers, go to www.lorman.com/ID391530.

Don't risk mistakes and penalties. Increase your 1099 filing know-how.

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

- Increase your filing savvy and avoid late filing and failure to file penalties
- Tackle your 1099-MISC questions
- Confidently correct errors – subdue even the toughest filing mistakes
- Effortlessly account for middleman payments



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Learning Objectives

- You will be able to explain the most common types of 1099s.
- You will be able to describe the Form 1099-MISC in depth.
- You will be able to discuss employee vs. independent contractor.
- You will be able to review filing and correcting returns.

For more detailed CE credit information, visit us at www.lorman.com/ID391530 or contact us at 866-352-9540.

Seminar Agenda

*This seminar will be presented by
Warren M. Bergstein, CPA and Jack E. Gold, CPA.*

8:00 AM – 8:30 AM	Registration	12:15 PM – 1:15 PM	Lunch (On Your Own)
8:30 AM – 8:45 AM	Overview <ul style="list-style-type: none">• IRS Information Reporting Procedures• Due Dates for Providing and Filing Form 1099 Series• Penalties for Noncompliance	1:15 PM – 2:30 PM	Filing and Correcting Return <ul style="list-style-type: none">• Electronic Filing and Paper Filing• Form 1096• Types of Errors• Procedures to Correct Errors and Voiding 1099s• Procedures to Correct Electronic Submissions
8:45 AM – 9:05 AM	Most Common Types of 1099s <ul style="list-style-type: none">• Form 1099-MISC, Form 1099-INT and Form 1099-DIV	2:30 PM – 3:00 PM	International Aspects of Wages and Contractor Reporting <ul style="list-style-type: none">• Contractor Payments• W-2 Reporting Obligations and Withholding Rules• Reporting Obligations for Non-U.S. Individuals
9:05 AM – 10:50 AM	1099-MISC Details <ul style="list-style-type: none">• Who Must File• Step-by-Step Actual Preparation of This Form• Categorizing Income• Income and Non-Income Reporting• Issuing vs. Receiving• Box 3 and 7 – When to Use• Box 7 and 14 – How to Report Attorney Payments• Self-Employment Tax Consequences• Remitter Responsibilities/Instructions for Payor• Recipient Responsibilities/Instructions for Payee• New York State Requirements, If Applicable• Reportable Payments to Corporations	3:00 PM – 3:10 PM	Break
10:50 AM – 11:00 AM	Break	3:10 PM – 4:00 PM	Issues in Reporting Lawsuits and Settlements <ul style="list-style-type: none">• Settlements, Taxable vs. Nontaxable• Payments to Attorneys (Possible Double Form 1099 Reporting)• Allocations in Settlement Agreements• Cancellation of Debt Issues (Form 1099-C Reporting)
11:00 AM – 12:15 PM	Independent Contractor <ul style="list-style-type: none">• Form 1099-MISC vs. Form W-2 (Independent Contractor vs. Employee)	4:00 PM – 4:30 PM	Legislative Update and Miscellaneous Issues <ul style="list-style-type: none">• What's Next?• Questions and Answers

Presented By:

Warren M. Bergstein, CPA

- Partner with Adelman Katz & Mond LLP
- More than 40 years of experience in tax preparation, trust and estate administration, personal financial planning and accounting
- Adjunct professor of accounting and taxation at Long Island University
- Writes for professional journals and lectures extensively before professional audiences on a variety of tax and financial planning topics
- M.S. degree in taxation, with distinction, Long Island University; B.B.A. degree in accounting, Bernard M. Baruch College, City University of New York

Jack E. Gold, CPA

- Audit and technology partner with Adelman Katz & Mond LLP
- Focuses on audit and compliance, technology systems and corporate finance
- Adjunct professor of accounting and taxation at Long Island University
- Works with clients to manage critical business processes, such as obtaining financing, completing acquisitions and raising capital through both public offerings and private placements
- Handles compliance issues, and designs and implements technology systems
- B.B.A. degree in accounting, Hofstra University

Yes!
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Dept. 5382, P.O. Box 2933
Milwaukee, WI 53201-2933

Where Is It?

NYC Seminar and
Conference Center
71 West 23rd Street, Suite 515
New York, New York
646-336-4455

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.

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