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IRS Form 1099 Reporting: What You Need to Know

Pittsburgh, PA • December 6, 2013

Faculty

Terri Bell, E.A., *Terri Bell & Associates*

Chris Dumbroski, *The Nottingham Group, LLC*

Stephen J. Pieklik, Esq., *Williams Coulson*

For more information about our speakers, go to www.lorman.com/ID391782.

The 1099 forms are confusing ... tackle all of your 1099 questions.

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

- Survive 1099 reporting in lawsuits and settlements – learn what's taxable and what's not
- Pinpoint when to issue a W-2 or 1099 form
- Increase your filing savvy and avoid late filing and failure to file penalties
- Confidently correct errors – subdue even the toughest filing mistakes

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Learning Objectives

- You will be able to identify the differences between independent contractors vs. employees.
- You will be able to discuss issues in reporting settlements and lawsuits.
- You will be able to describe filing mistakes and the consequences of not resolving them.
- You will be able to explain what is ahead - continued changes in this area of the law.

For more detailed CE credit information, visit us at www.lorman.com/ID391782
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Seminar Agenda

8:00 AM - 8:30 AM	Registration
8:30 AM - 10:40 AM	Overview of Form 1099 and Compliance — Terri Bell, E.A. <ul style="list-style-type: none">• Brief History of the Form• Who Needs to File?• How and When to File (Form 1096)• Penalties for Noncompliance• Common Types of Forms 1099 (MISC, INT, DIV) and Their Purposes Form 1099 vs. Form W-2 (Independent Contractor vs. Employee) <ul style="list-style-type: none">• Independent Contractor Defined• Penalties for Incorrect Issuance of Form 1099 Instead of a Form W-2
10:40 AM - 10:50 AM	Break
10:50 AM - 12:20 PM	Issues in Reporting Settlements and Lawsuits — Stephen J. Pieklik, Esq. <ul style="list-style-type: none">• Taxable and Nontaxable Settlements• Payments to Attorneys• Importance of Allocations in Settlement Agreements• Cancellation of Debt Issues

12:20 PM - 1:20 PM	Lunch (On Your Own)
1:20 PM - 2:10 PM	Recent Developments — Stephen J. Pieklik, Esq. <ul style="list-style-type: none">• New and Revised Reporting Requirements• New Guidance• IRS's Voluntary Classification Settlement Program
2:10 PM - 2:20 PM	Break
2:20 PM - 4:30 PM	Filing Mistakes and What's Ahead — Chris Dumbroski <ul style="list-style-type: none">1099 Mistakes<ul style="list-style-type: none">• Common 1099 Mistakes• Resolving 1099 Mistakes• Consequences of Not ResolvingWhat Is Ahead?<ul style="list-style-type: none">• Continued Changes in This Area of the Law• Health Care Reform Act and 1099s• Merchant Reporting• New Tax Laws

Presented By:

Terri Bell, E.A.

- President and CEO of Terri Bell & Associates
- Practices in tax preparation, taxpayer representation before the IRS, retirement planning and estate planning
- Serves many small and medium sized businesses who issue and receive Form 1099 reporting statements annually
- Earned certified financial planner designation
- B.A. degree, Hampton University; M.A. degree, Ohio State University

Chris Dumbroski

- Senior consultant at The Nottingham Group, LLC
- Practice areas include forensic accounting, fraud investigations and economic loss studies
- Works with businesses and individuals to ensure tax compliance and resolve tax disputes
- LL.M. degree in taxation, Villanova University Law School; J.D. degree, DePaul College of Law; B.A. degree, cum laude, Dickinson College
- Can be contacted at 412-288-9948 or cdumbroski@nottinghamgroup.com

Stephen J. Pieklik, Esq.

- Attorney concentrating in federal tax administration and controversy matters with Williams Coulson
- Regularly represents businesses and independent contractors at IRS audit and appeals and before the U.S. Tax Court
- Regularly advises businesses on Form 1099 reporting matters, including the IRS's Voluntary Classification Settlement Program
- Member of the Administrative Practice Committee of the Tax Section of the American Bar Association, the Tax Section of the Allegheny County Bar Association, and the Allegheny Tax Society
- J.D. degree, University of Pittsburgh School of Law; B.S. degree in accounting, Miami University
- Can be contacted at 412-454-0229 or spieklik@williamsoulson.com

Yes!
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 Add a Tax Professionals' Resource Silver Membership (\$397.00) and attend for 25% off! (\$254.25) = \$651.25

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MAIL: Mail this form with payment to:
Lorman Education Services
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Milwaukee, WI 53201-2933

Where Is It?

Hilton Garden Inn
Pittsburgh University Place
3454 Forbes Avenue
Pittsburgh, Pennsylvania
412-683-2040

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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