

July 19, 2011

IRS/Georgia Practitioner Liaison Meeting

Atlanta, GA

Attendees:

American Association of Attorney- Certified Public Accountants (AAA-CPA):

Angie Napier, AAA-CPA, 404-614-8602, angie.napier@kpmg.com

Patti M. Richards, AAA-CPA, 404-846-3351, prichards@richardslawfirm.com

American Institute of Certified Public Accountants (AICPA):

Robert Gard, AICPA, 770-913-0210, bob@glcpas.net

Atlanta Bar Association:

Richard Litwin, Atlanta Bar Association, 678-990-0600, rlitwin@litwinlaw.net

Vivian Hoard, Atlanta Bar Association, 770-541-2223, vhoard@taylorenghish.com

Georgia Association of Accountants and Tax Professionals (GAATP):

Cecil Norris, GAATP, 770-867-3601, ncecil@aol.com

Harold Stamey, GAATP, 770-476-1943, harold@hstameycpa.com

Georgia Association of Enrolled Agents (GAEA):

Bill Nemeth, GAEA, 770-616-1638, wgnemeth@aol.com

Chet Burgess, GAEA, 404-915-6268, chetburgess@brookwoodtax.com

Georgia Department of Revenue Liaison (GSCPA):

Ronald M. Herman, GSCPA, 770-916-9910, rherman@hermansilvercpas.com

Georgia National Association of Tax Professionals (GA-NATP):

Brian Brewton, GA-NATP, 706-776-2906, sbaservices@windstream.net

Greg Dangar, GA-NATP, 770-591-8505, greg@dangarassociates.com

Georgia State University Law School Low Income Tax Clinic:

Willard Timm, GSU-LITC, 404-413-9232, wtimm@gsu.edu

Georgia Society of Certified Public Accountants (GSCPA):

Brad Dickson, GSCPA, 770-730-5000, bdickson@windhambrannon.com

Joel L. Pascaner, GSCPA, 404-262-2181, jpascaner@bermonllc.com

Members at Large:

R Peter Fishman, GSCPA-Chairman, 404-252-3773, fish1276@aol.com

Shirl Bishop, GAEA, Recording Secretary, 770-482-9380, sbishopea@aol.com

Mercer University:

Catherine Cleaveland, Mercer University, 404-518-2140, cleaveland_c@mercer.edu

National Society of Tax Professionals (NSTP):

Laurie Conner Jarrett, NSTP, 770-479-4000, connersatl@aol.com

Other Attendees:

Larry Nichols, GSCPA, 770-850-1899, lnichols@lwncpa.com

Lauren M. Marlow, GSCPA, 720-217-9325, lmарlow@marlowmckenzie.com

State Bar of Georgia:

Jeffrey H Kess, State Bar, 404-223-5900, jkess@gomeldavis.com

Taxation Committee (GSCPA):

John Masters, GSCPA, 404-240-0048, johnmasters@mindspring.com; jmasters@jmasters.com

Keith Early, GSCPA, 770-850-1899, kearly@lwn CPA.com

Internal Revenue Service:

Aaron Rushing, IRS-Examination, 404-338-8407, aaron.rushing@irs.gov

Alicia Allen, IRS-SL, 404-338-9267, alicia.d.allen@irs.gov

Beverly Thomas, IRS-ACS, 678-530-6517, beverly.thomas@irs.gov

Craig McLaughlin, IRS-SL, 954-423-7748, craig.mclaughlin@irs.gov

Dawn Escobar, IRS-Collection, 404-338-9252, dawn.m.excoabar@irs.gov

Eric Goodwin, IRS-Appeals, 404-338-7313, eric.h.goodwin@irs.gov

Karen L. Russell, IRS-SL, 478-334-1998, karen.l.russell@irs.gov

Kathy Primm, IRS-Atlanta Campus, 678-530-5434, kathy.l.primm@irs.gov

Lucille Dunn, IRS-SLHQ, 202-622-3173, lucille.p.dunn@irs.gov

Mikki Betker, IRS-SPEC, 404-338-8893, mikki.m.betker@irs.gov

Nancy Sanabria, IRS-W&I, 404-338-9302, nancy.c.sanabria@irs.gov

Nina Ellison, IRS-W&I, 678-627-4700, nina.a.ellison@irs.gov

Remonia Brown, IRS-SPEC, 404-338-8389, remonia.brown@irs.gov

Sandra Adams, IRS-GL, 404-338-7905, sandra.h.adams@irs.gov

Vince Picardi, IRS-TIGTA, 404-338-7381, vince.picardi@tigta.treas.gov

Yetta Ivory, IRS-TAS, 404-338-7652, yetta.ivory@irs.gov

Meeting Summary

The Georgia Society of CPAs hosted the meeting at offices located at 3353 Peachtree Road NE Suite 400, Atlanta, GA.

Pete Fishman, *Chairman*, called the meeting to order and asked that everyone introduce themselves to the other attendees.

Karen L. Russell, *IRS-SB/SE Sr. Stakeholder Liaison (SL)*, Karen got the meeting started by announcing the 2 guest speakers for the day. She instructed both the audience and the speakers to talk directly into the microphone for questions and answers so that the Microsoft Live audience could hear. She also requested all attendees, both in person and online, complete the SL Event Survey to help in improving the Practitioner Liaison Meetings and to provide suggestions for future speakers.

Patty Bergstrom, *IRS-Criminal Investigator/Public Information Officer*, Patty's presentation was on Criminal Investigation Highlights for 2011. Due to copyright issues, the presentation could not be shared with the PLM participants. Patty discussed many cases that had gone to court and the outcome of each and had streaming video of various news clips/interviews of individuals/companies that had been closed down and prosecuted by the IRS CI division.

If anyone has questions for Patty, you may contact her by telephone, 404-338-7540, or email, patricia.bergstrom@ci.irs.gov.

Sandra Adams, IRS-PIPDS Governmental Liaison, Sandra completed a presentation on the new Municipal Agency Partnering Program (MAPP). MAPP expands Governmental Liaison's (GL's) mission of governmental partnering and data sharing by engaging municipal agencies. MAPP assists local governments in providing service to taxpayers, and supports programs that promote effective tax administration. Fourteen municipalities currently qualify to receive federal tax information.



MAPP
Presentation.pps

The following attachment addresses questions that were asked by the audience regarding MAPP, its members and how often the team meets:



Municipal Agency
Partnering Program C

The following link found on irs.gov provides additional information regarding MAPP:
<http://www.irs.gov/govt/liaisons/article/0,,id=239914,00.html>

If you have further questions for Sandra, please contact her by telephone, 404-338-7905, or email, Sandra.H.Adams@irs.gov.

Roundtable & Comments:

Alicia Allen, IRS-SB/SE, Alicia promoted participation in the upcoming Anti-Money Laundering Seminar being held in downtown Atlanta at the Georgia State Bar Association, 104 Marietta Street NW, Suite 100, Atlanta, Georgia from 8:30 am to 12:30 pm, September 20, 2011. If you would like to attend, **please register NLT September 16, 2011**. See the attached flyer for additional information.



Atlanta AML
Seminar.pdf

Craig McLaughlin, IRS-SB/SE, Craig encouraged the audience to utilize IRS' video portal; he reiterated that a wealth of useful information is available to individuals, small businesses and tax professionals on the site.

Karen L. Russell, IRS-SB/SE, Karen again requested the audience complete the SL Event Survey.

She advertised the Direct Sellers Webinar hosted by SB/SE July 27th from 2 pm – 3 pm.

She discussed the IRS' announcement regarding mailing letters to preparers that did not follow the new PTIN on returns prepared this filing season. She informed the participants IRS planned to contact taxpayers that appeared to have received assistance with their returns but lacked preparer signatures; the letter instructs taxpayers on how to file a complaint and how to choose a legitimate preparer.

Karen reviewed Offer in Compromise highlights. Beginning July 5th, the revised Form 656, revision date March 2011, must be used when submitting an offer. She advised if an offer is submitted on an outdated form, the IRS will return Form 656, but not the other forms contained in the offer. She clarified that this does not constitute rejection of the offer, but rather a request to submit the offer on the most current form.

She shared that the IMRS staff created collector issue 11-0001486 to capture unique questions regarding requests made by SB/SE Examination employees to taxpayers and practitioners for electronic records. This issue was created to address concerns about policies and procedures regarding this practice.

Finally, Karen reviewed the standard mileage rate changes effective July 1st:

- 55.5 cents per mile for business use of an automobile
- 23.5 cents for use of an automobile as a medical or moving expense
- 14 cents as a charitable contribution (fixed by statute)

Remonia Brown, IRS-SPEC, Remonia announced SPEC was looking for partners for VITA/TCE; volunteers could earn CPE credits for teaching. Attached is a sample article for organizations to use to reach customers which can be posted on websites and/or used in other communication vehicles. You may contact Remonia at **404-338-8389** if you are interested in becoming a volunteer.



Vita_Volunteer.pdf

Vince Picardi, IRS-TIGTA, Vince advised that if a client clicks on a phishing email and becomes a victim of identity theft, contact TIGTA at **1-800-366-4484**, they may work the case.

Next Scheduled Meeting

The next meeting will be on **Tuesday, October 18, 2011**.