

2012 OrSEA Spring Conference
Conference Education Schedule
“Agates by the beach”



IRS Provider Number B6U61 Approved for EA's and RTRP's

May 21th – Monday

11:00 PM – 4:00 PM Board luncheon/meeting
5:30 PM - BBQ

May 22th – Tuesday

7:00 AM – 8:00 AM Registration, coffee and snacks
8:00 AM – 5:30 PM **C. Dale Boushley** Client Data Security(Ethics 2 CPE), Program Number - B6U61-E-00001-12-I
Foreclosure, Short Sale, CODI, Recapture (6 CPE), Program Number - B6U61-T-00002-12-I

May 23rd – Wednesday

7:00 AM – 8:00 AM Registration, coffee and snacks
8:00 AM – 5:00 PM **Helen O’Planick EA** Representation going from simple to complex (7 CPE)
Program Number - B6U61-T-00003-12-I

7:00 PM – 9:30 PM Awards banquet/officer installation

May 24th – Thursday

7:00 AM – 8:00 AM Registration, coffee and snacks
8:00 AM – 3:00 PM **Jeffrey Wong** Representing Clients in Tax Audit, A Ringside Seat at the Recession and Tax Issues for a Recession (6 CPE) Program Number - B6U61-T-00004-12-I

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Client Data Security

As income tax preparers we have the same security obligations as "financial institutions" under the Graham-Leach-Bliley Act. The new Circular 230 also imposes client data security requirements. Do you know what your obligations are under each? Tax professionals store confidential data on paper and electronically; in our offices, on local networks and "in the cloud". Let's discuss what information is considered confidential and how to keep in that way.

Foreclosure, Short Sale, CODI, Recapture

There has never been a time when so many foreclosures and short sales have come to our offices. Where are they reported on the tax return? Is cancellation of debt always taxable? If my client qualifies for relief from cancellation of debt income what is my obligation as the tax professional? This topic will fill every bit of a two hour presentation.

Representation going from simple to complex

Over the past several years the IRS has dramatically increased its enforcement efforts. During fiscal 2010 we saw increased hiring of IRS enforcement personnel. This session will discuss the methods the IRS is using in this new enforcement environment. You will learn about new IRS examination priorities and procedures, registration of tax preparers, new IRS collection priorities and procedures, new IRS criminal investigation initiatives, recent important developments for practitioners, Taxpayer Advocate Services Report on problems in the tax system, new procedures at IRS campuses and which campuses are closing, and the impact of new IRS leadership

Each day the Internal Revenue Service asserts millions of dollars in tax penalties against taxpayers. Many of those penalties are subsequently abated because of quality representation by experienced practitioners. This session will cover the basics of supporting reduction of IRS tax penalties. We will address reasonable cause, ordinary business care and prudence, and Internal Revenue Service preferred reasons for abatement of penalties.

2012 OrSEA Spring Conference**“Agates by the beach”****Speaker Bios:****Helen O’Planick, EA**

Helen P. O’Planick began her tax career as a VITA/TCE volunteer in Kingman, Arizona, in 1984. She became an enrolled agent in 1994, and owns HELJAN Associates, LLC, in York, Pennsylvania. HELJAN serves business and individual clients with write-up, payroll, tax preparation, financial, and representative services. Helen also teaches for professional organizations including the IRS, and serves PA as an IRS electronic filing guru. Helen served on ETAAC, the Electronic Tax Administration Advisory Committee, and is currently team leader of "Tax Experts" on AOL. She is treasurer and past president of the PA Society of Enrolled Agents and was an NAEA director. Helen is a registered representative with Series 6/63 licenses.

C. Dale Boushley CFP®, EA

Dale has been in the income tax and financial planning business since 1976. Dale and his wife Sharon own Financial Resource Management, Inc. which provides income tax preparation and planning services to over 500 clients. Dale also provides financial planning and asset management services through Securities America Advisors, Inc. He graduated from the College of Financial Planning in 1988 and earned the Certified Financial Planner® designation at that time. Dale is an Enrolled Agent with the Internal Revenue Service and is a registered representative of and offers securities through Securities America Inc. member FINRA/SIPC, holding series 7, 24 and 63 licenses.

Jeff Wong

Solo Practice, June, 2009 through present. Private practice focusing on tax controversy, bankruptcy, and debtor representation.

Greene & Markley PC. August, 1998 through May, 2009. Private practice focusing on tax controversy, bankruptcy, and debtor representation. Elected a shareholder in January, 2005. Developed and managed a tax and bankruptcy department consisting of four attorneys and two paralegals.

Special Assistant US Attorney, District of Oregon, and trial attorney for Chief Counsel for the Internal Revenue Service, 1988 to 1998. Duties included:

- Primary advisor to the Oregon IRS Special Procedures Function and Collection Division Field Branch from 1991 to 1998. Provided oral and written advice on virtually all aspects of bankruptcy and field collection administration. Review, as required by the Internal Revenue Manual, of extraordinary collection actions.

- Development and litigation of tax-related cases before the US Bankruptcy Court and income tax controversies before the US Tax Court. Primary bankruptcy litigator for the IRS in Oregon from 1991 to 1998; handled most bankruptcy controversies involving large tax liabilities or novel issues.
- Coordination of investigative efforts of the Examination and Collection Divisions in large dollar unreported income and concealed asset cases involving multiple bank account and entity schemes. Civilly prosecuted several of these cases.
- Referral and coordination of tax cases before the US District Court with the Department of Justice.
- "Toti Case" Coordinator for the Western Region (13 states) from 1996 to 1998. Review of all cases involving the assertion of tax nondischargeability under the attempt to evade or defeat tax exception to discharge of 11 U.S.C. § 523(a)(1)(C).
- Instructing Chief Counsel attorneys, IRS Officers and Agents in Oregon, and employees of other governmental agencies on a wide variety of tax and non-tax issues in Treasury sponsored educational events.
- Disclosure Coordinator for Portland District Counsel. Provided advice to the IRS Disclosure Officer and other IRS personnel on the tax confidentiality laws.

Trial attorney, Office of Chief Counsel for the Internal Revenue Service, Laguna Niguel, California District, 1984 to 1988. Duties included:

- Development and litigation of individual and corporate income tax cases before the US Tax Court. Responsible for numerous abusive tax shelter investigations and enforcement actions; Coordinator for shelter investments involving electricity producing windmills.
- Primary lien, seizure, and bankruptcy advisor to the Laguna Niguel Special Procedures Function and Field Collection Branch, 1987-1988.
- Acting Assistant District Counsel, 1987-1988. Trained and managed six attorneys.

We reserve the right to make speaker substitutions in case of cancellations.

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Registration Form – 21 hours continuing education
(3 day registration fee includes 3 lunches and banquet)

Name _____ Badge Name _____

Address _____ City _____ State _____ Zip _____

Phone _____ PTIN _____ EA _____ CPA _____ Attorney _____ LTC _____ other _____

If Staff, member's name _____ e-mail address _____

How many OrSEA conferences have you attended _____

Only one registration per form please

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N. Bend, Or. 97459

Exp. Date _____ Charge Amt. _____

Phone # 541-756-2929

maddy@epuerto.net

Information on website www.orsea.org

Early registration before April 24th (all 3 days)

NAEA member/staff - \$425.00

Non-member – \$450.00 \$ _____

Registration after April 24th (all 3 days)

NAEA member/staff – \$450.00

Non-member – \$475.00 \$ _____

Banquet is included in the 3 day registration fee
Daily lunch, Tuesday thru Thursday, is included in
Registration fee. Sorry, no discount if you don't sta
for lunch.

One-day registration:

Circle day: TUE. WED. THU.

NAEA member/staff – \$175 \$ _____

Non-member - \$195.00 \$ _____

Guest banquet add \$35.00 \$ _____

Board luncheon add \$15.00 \$ _____

Board officers and directors please RSVP for Board lunch
(OrSEA officers, directors and committee chairs free)

Optional Monday Night BBQ add \$5.00 \$ _____

Less OrSEA Coupon

\$50 for all members or

\$100 for first time member (not attended

in three years) See WEB site for

coupons (\$ _____)

Total \$ _____

Cancellations: All cancellations subject to a \$50.00 handling charge. No refunds after April 24th, substitutions OK.

ORSEA

OREGON SOCIETY
OF ENROLLED AGENTS

POWERING AMERICA'S TAX EXPERTS

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Hotel Information:

Best Western Inn	The Inn at Face Rock 3225 Beach Loop Drive Bandon, Or 97411 (541) 347-9441 (800) 638-3092 (541) 347-2532 (fax)	Room rates: Single/Double	\$ 75.00
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