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# IRS Form 1099 Reporting: *What You Need to Know*

Grand Junction, CO • October 22, 2013

## Faculty

**Moderator:**

**John Gallo, CPA, John Gallo, CPA LLC**

**Tanya R. Baber, E.A., ATI Solutions, Inc.**

**Theresa Gallegos, CPA, Streamline Accounting, Inc.**

For more information about our speakers, go to [www.lorman.com/ID389954](http://www.lorman.com/ID389954).

## **Increase your 1099 filing savvy and avoid late filing and failure to file penalties.**

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**

- Tackle your 1099-MISC questions
- Pinpoint when to issue a W-2 or 1099 form
- Perfect your backup withholding rules know-how
- Confidently correct errors – subdue even the toughest filing mistakes

## **Continuing Education Credit**



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## **Learning Objectives**

- You will be able to review 1099 MISC.
- You will be able to discuss independent contractor vs. employee.
- You will be able to explain liability of misclassification.
- You will be able to identify backup withholding.

For more detailed CE credit information, visit us at [www.lorman.com/ID389954](http://www.lorman.com/ID389954) or contact us at 866-352-9540.



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# Seminar Agenda

8:00 AM – 8:30 AM	<b>Registration</b>	11:30 AM – 12:30 PM	<b>Lunch (On Your Own)</b>
8:30 AM – 10:00 AM	<b>1099s in General</b> — Theresa Gallegos, CPA and John Gallo, CPA	12:30 PM – 2:30 PM	<b>Independent Contractor vs. Employee</b> — Tanya R. Baber, E.A.
	<b>Types of 1099s</b>		<b>Advantages/Disadvantages</b> <ul style="list-style-type: none"><li>• Of Hiring Independent Contractors</li><li>• Of Being an Independent Contractor</li></ul>
	<b>1099 MISC</b>		<b>Liability of Employee Misclassification</b>
10:00 AM – 10:10 AM	<b>Break</b>		<b>IRS Factors</b>
10:10 AM – 11:30 AM	<b>1099 MISC (Continued)</b> — John Gallo, CPA		<b>Voluntary Classification Settlement Program</b>
	<b>1096</b>		<b>Safe Harbors</b>
	<b>Corrected 1099s</b>	2:30 PM – 2:40 PM	<b>Break</b>
	<b>Penalties</b>	2:40 PM – 4:30 PM	<b>Case Studies</b> — Tanya R. Baber, E.A., Theresa Gallegos, CPA and John Gallo, CPA
	<b>Backup Withholding</b>		
	<b>W-9/W-8 BEN/I.D. Number Matching</b>		<b>Questions and Answers, How Should You Deal With Your Situations</b>

## Presented By:

### **Tanya R. Baber, E.A.**

- Founder of ATI Solutions, Inc.
- Enrolled agent, public accountant and licensed in Colorado for property and casualty insurance
- Focuses on advanced tax problem resolution for small to medium sized business and individuals
- More than 20 years of experience in business, individual and nonprofit accounting, and tax preparation services
- Handles multistate issues including income tax, sales tax and multistate employers
- Quickbooks Pro Advisor
- Lectures to business owners on basic bookkeeping
- B.S. degree in public accounting, Mesa State College
- Can be contacted at 970-255-9300 or tbaber@acsol.net

### **Theresa Gallegos, CPA**

- Founder of Streamline Accounting, Inc.
- Services include multistate income tax returns, registrations and payroll, including W-2's and financial analysis
- Focuses on providing services to small C Corporations, S Corporations, LLC's as well as sole proprietors
- Certified public accountant and recently received a real estate brokers license
- B.S. degree in public accounting, Mesa State College
- Can be contacted at 970-243-5463 or tgallegoscpa@gmail.com

### **John Gallo, CPA – Moderator**

- Certified public accountant with John Gallo, CPA LLC
- Chief financial officer for medium-size innovative distribution company, involved in all aspects of business operations
- More than 35 years of experience in small business and individual tax preparation and planning
- Works closely in the employment process developing policies, procedures and manuals for business clients including handling independent contractor issues
- Accounting and financial planning and consulting
- Business and production efficiency and process improvement consulting
- Conducts training in entrepreneurship, business organization and business operation
- B.S.B.A. degree in accounting, Metropolitan State College
- Can be contacted at 303-817-7855 or john@johngallocpa.com



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MAIL: Mail this form with payment to:  
Lorman Education Services  
Dept. 5382, P.O. Box 2933  
Milwaukee, WI 53201-2933

### Where Is It?

Holiday Inn Hotel & Suites  
Grand Junction Airport  
2751 Crossroads Boulevard  
Grand Junction, Colorado  
970-424-5888

### 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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