

# Welcome to TaxMama's® Place - Home of the



**Today's Topic:**

**October 2020  
Tax Roundtable**



## Intuit is Hiring Remote employees

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Mary Fran says they will pay her \$1000 for hired referrals.  
I am sure she would be happy to split it with you if you get hired

[faststats@faststatschecks.com](mailto:faststats@faststatschecks.com)

[October 15 deadline nears for taxpayers who requested tax filing extensions](#)

IR-2020-231, October 7, 2020 — The Internal Revenue Service today reminds taxpayers who filed an extension that the October 15 due date to file their 2019 tax return is near.

[IRS Free File marks record increase; available through Oct. 15](#)

IR-2020-230, October 6, 2020 — The Internal Revenue Service announced today that Free File, the IRS-private sector partnership that offers free tax preparation products, scored a record percentage increase in new users as taxpayers turned to free name-brand providers in 2020.

[IRS extends Economic Impact Payment deadline to Nov. 21 to help non-filers](#)

IR-2020-229, October 5, 2020 — The Internal Revenue Service announced today that the deadline to register for an Economic Impact Payment (EIP) is now November 21, 2020.

### **IRS has taken steps to confirm the integrity of systems protecting taxpayer data**

September 29, 2020 — IRS Statement about the integrity of our tax system depends on all taxpayers knowing that their return information is subject to the highest levels of confidentiality and protection in the hands of the IRS.

### **IRS Statement on Economic Impact Payments by state (as of Aug. 28, 2020)**

August 28, 2020 — The following chart shows the number of Economic Impact Payments and the total amount of the payments by state.

### **Failure to deposit penalties on some employers claiming new tax credits**

August 21, 2020 — Statement on the failure to deposit penalties on some employers claiming new tax credits.

### **IRS temporarily stops mailing notices to taxpayers with balances due**

August 21, 2020 — IRS statement on temporarily stopping the mailing of balance due notices.

**Here's what taxpayers need to know about their right to finality**

Tax Tip 2020-134, October 8, 2020

**An overview of excise tax**

Tax Tip 2020-133, October 7, 2020

**People experiencing homelessness may qualify for an Economic Impact Payment**

COVID Tax Tip 2020-132, October 6, 2020

**Business owners should visit IRS.gov for help with tax actions when closing a business**

Tax Tip 2020-131, October 5, 2020

**Taxpayers should know and understand their correct filing status**

Tax Tip 2020-130, October 1, 2020

**Terms to help taxpayers better understand Individual Retirement Arrangements**

Tax Tip 2020-129, September 30, 2020



**Commissioner  
Charles P. Rettig**

Charles P. Rettig is the 49th Commissioner of the IRS. In leading the IRS, Mr. Rettig is focused on improving service to the nation's taxpayers, balancing appropriate enforcement of the nation's tax laws while respecting taxpayer rights.



**Staff Sgt. David  
Bellavia**

This past Summer David Bellavia was awarded the Medal of Honor for heroic efforts on Nov. 10, 2004, during the Third Battle in Fallujah—dramatic efforts that saved the lives of his unit members.



**National Director  
Lawrence Lawler**

Larry is a CPA, EA, and a Certified Tax Resolution Specialist. He is also the National Director of the American Society of Tax Problem Solvers. He is an active practitioner and has represented thousands of cases throughout his career.



**LG Brooks**

LG is an EA, and a Certified Tax Resolution Specialist. He is the Director of Education for the American Society of Tax Problem Solvers. He is an active practitioner with over 25 years of experience.



**Jo-Ann Weiner**

Jo-Ann is an EA and has over 35 years of experience with the IRS as a Revenue Agent auditing federal tax returns and working as a special enforcement agent on civil cases, criminal cases, and grand jury cases. She is now in private practice.



**Gary Bluestein**

Gary Bluestein is an Attorney and focuses his practice exclusively on tax representation. Prior to entering private practice, Gary served as a Senior Attorney for the Internal Revenue Service and was a Special Assistant United States Attorney.



**Eva Rosenberg**

Eva Rosenberg, BA, EA, known as the Internet's TaxMama®, publishes the popular TaxMama®.com website, cited by Consumer Reports magazine as a top tax advice site, and a LIFE Magazine Editors Pick. She is also the Dean of TaxMama®'s Online Enrolled Agent Review Course.



**Bob McKenzie**

Prior to entering private practice, Mr. McKenzie was employed by the Internal Revenue Service, Collection Division, in Chicago, Illinois. Since entering private practice, he has dedicated a major portion of his time to representation before the IRS.



**Steve Klitzner**

Steve is an Attorney and a Certified Tax Resolution Specialist from South Florida. He is a long time instructor with the American Society of Tax Problem Solvers. He is an active practitioner with over 20 years of experience.



**Roger Nemeth**

Roger is the founder of Tax Help Software and is largely regarded as the industry expert on IRS Transcripts. In addition to creating one of the top tax resolution software programs, he has taught thousands of tax professionals how to better represent their clients before the IRS.



TAXPAYER REPRESENTATION  
SUPER CONFERENCE

Amazing Seminar in  
November!

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<http://trsc2020.com/agenda/>

### Day 1 | November 4th

10:40am – 11:00am Welcome & Housekeeping

11:00am – 12:40pm Taxpayer Representation Under the Taxpayer First Act | *Larry Lawler, CPA, EA, CTRS*

12:40pm – 1:00pm Break

1:00pm – 2:00pm Tax Research Online | *Eva Rosenberg, EA*

2:00pm – 3:00pm Lunch

3:00pm – 4:00pm You CAN Fix the IRS – Resolving IRS Systemic Problems | *Eva Rosenberg, EA*

4:00pm – 4:20pm Break

4:20pm – 6:00pm Debt Forgiveness Issues – The Coming Tidal Wave | *Gary Bluestein, Esq.*

### Day 2 | November 5th

10:40am – 11:00am Welcome & Housekeeping

11:00am – 12:10pm What Tax Problem Solvers can Expect from the Post-Covid IRS | *Commissioner Rettig*

12:10pm – 12:20pm Break

12:20am – 2:00pm Future of IRS Appeals under AJAC and Taxpayer First Act | *LG Brooks, EA, CTRS*

2:00pm – 3:00pm Lunch

3:00pm – 4:40pm E-Services Best Practices & E-Signatures | *Roger Nemeth, EA, CTRS*

4:40pm – 5:00pm Break

5:00pm – 6:00pm How Leaders Adapt to Changing Environments | *Staff Sgt. David Bellavia*

### Day 3 | November 6th

10:40am – 11:00am Welcome & Housekeeping

11:00am – 12:40pm CDP and CAP Appeals in the Post-Pandemic World | *Steve Klitzner, Esq., CTRS*

12:40pm – 1:00pm Break

1:00pm – 2:00pm New Exposure in Small Business Audits | *Jo-Ann Weiner, EA*

2:00pm – 3:00pm Lunch

3:00pm – 4:00pm New Exposure in Small Business Audits Continued... | *Jo-Ann Weiner, EA*

4:00pm – 4:20pm Break

4:20pm – 6:00pm COVID Related Collection Issues | *Bob McKenzie, Esq., EA*



We have no Advance Questions

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So....



### October 15th Deadline and Extended Filing Deadlines for Disasters

- <https://www.irs.gov/newsroom/the-oct-15-deadline-for-extension-filers-is-almost-here>
- <https://www.irs.gov/newsroom/tax-relief-presidentially-declared-disaster-areas>
- <https://www.irs.gov/newsroom/around-the-nation>

IRS provides tax relief for victims of California wildfires; Oct. 15 deadline, other dates extended to Dec. 15

- Victims of Hurricane Sally that began September 14, 2020 now have until January 15, 2021
- <https://www.irs.gov/coronavirus-tax-relief-and-economic-impact-payments>

Premature IRS Notices regarding unpaid payroll taxes - and what to do about them. The failure to deposit penalties assessed against employers following the law

- <https://www.irs.gov/newsroom/failure-to-deposit-penalties-on-some-employers-claiming-new-tax-credits>
- <https://www.irs.gov/newsroom/deferral-of-employment-tax-deposits-and-payments-through-december-31-2020>

<https://www.inc.com/diana-ransom/ppp-loan-forgiveness-delays-sba-banks-taxes.html>

<https://www.journalofaccountancy.com/news/2020/sep/ppp-loan-forgiveness-what-cpas-should-do.html>

Application - <https://www.sba.gov/sites/default/files/2020-05/3245-0407%20SBA%20Form%203508%20PPP%20Forgiveness%20Application.pdf>

FAQs - <https://www.sba.gov/sites/default/files/2020-08/PPP%20--%20Loan%20Forgiveness%20FAQs%20%28August%2011%2C%202020%29.pdf>

<https://www.kabbage.com/ppp-loan-forgiveness/>

# QUESTIONS

- You can find today's handout in the Board after the session

<http://irsexams.com/board/index.php?/topic/956-taxmamas-tax-roundtables/>

- And at the TaxMama site  
<http://taxmama.com/tax-quijs/taxmamas-tax-roundtables-2018/>