

Cokala Tax Group: 2018 FORM 1099 and 1042-S/FATCA Classes

Register at 734-358-7875 or send your registration by email, fax or mail

Form 1099 Tax Reporting for 2018: 1-day class. Covers what is reportable and who is reportable for 2018, concentrating on the types of transactions processed through Accounts Payable and P&C insurance claims. Includes understanding and working with Form W-9 to identify reportable payees and whether any exemption applies; IRS 2018 filing and payee statements; TIN compliance and backup withholding required procedures including IRS CP2100 and 972-CG Notices; basic state reporting requirements.

Form 1042-S/Forms W-8/FATCA Tax Compliance for 2018: 1-day class. Covers Form 1042-S reporting and tax withholding at source on payments to nonresident alien individuals and entities, and FATCA (Foreign Account Tax Compliance Act); using Forms W-8 to certify foreign payee status for tax purposes; presumption rules used in the absence of reliable documentation; tax withholding; IRS Form 1042-S reporting of payments and withholding; IRS Form 1042 which reports and reconciles withholding liabilities.

2-day class for 2018 Form 1042-S/Forms W-8/FATCA Tax Compliance: With two full days of training, this program provides all of the compliance information of the 1-day class *plus* deeper coverage of Form W-8 and 8233 validation, tax treaty claim validation, permitted activities of nonimmigrant individuals, and payments to foreign agents and intermediaries.

BIRMINGHAM AL	<input type="checkbox"/> Form 1099, Thur. Oct. 25	<input type="checkbox"/> Form 1042-S/FATCA, Fri. Oct. 26
BOSTON	<input type="checkbox"/> Form 1099, Mon. Oct. 8	<input type="checkbox"/> Form 1042-S/FATCA, Tue. Oct. 9
CHICAGO	<input type="checkbox"/> Form 1099, Thur. Sept. 27	<input type="checkbox"/> Form 1042-S/FATCA, Fri. Sept. 28
CINCINNATI	<input type="checkbox"/> Form 1099, Mon. Sept. 24	<input type="checkbox"/> Form 1042-S/FATCA, Tue. Sept. 25
CLEVELAND	<input type="checkbox"/> Form 1099, Mon. Sept. 10	<input type="checkbox"/> Form 1042-S/FATCA, Tue. Sept. 11
DALLAS	<input type="checkbox"/> Form 1099, Tue. Nov. 27	
DALLAS 2-day 1042-S	<input type="checkbox"/> Wednesday Nov. 28 and Thursday Nov. 29	
DETROIT	<input type="checkbox"/> Form 1099, Wed. Sept. 12	
DETROIT 2-day 1042-S	<input type="checkbox"/> Thursday Sept. 13 and Friday Sept. 14	
DC (suburban Virginia)	<input type="checkbox"/> Form 1099, Tue. July 24	
DC 2-Day 1042-S class	<input type="checkbox"/> Wednesday July 25 and Thursday July 26	
NEWARK	<input type="checkbox"/> Form 1099, Thur. Oct. 11	<input type="checkbox"/> Form 1042-S/FATCA, Fri. Oct. 12
ORLANDO	<input type="checkbox"/> Form 1099, Thur. Feb. 15	<input type="checkbox"/> Form 1042-S/FATCA, Fri. Feb. 16
PHILADELPHIA	<input type="checkbox"/> Form 1099, Mon. June 18	<input type="checkbox"/> Form 1042-S/FATCA, Tue. June 19
PHOENIX	<input type="checkbox"/> Form 1099, Thur. Dec. 13	<input type="checkbox"/> Form 1042-S/FATCA, Fri. Dec. 14
RALEIGH-DURHAM	<input type="checkbox"/> Form 1099, Mon. Oct. 22	<input type="checkbox"/> Form 1042-S/FATCA, Tue. Oct. 23
ST. LOUIS	<input type="checkbox"/> Form 1099, Thur. June 21	<input type="checkbox"/> Form 1042-S/FATCA, Fri. June 22
SALT LAKE CITY	<input type="checkbox"/> Form 1099, Mon. Dec. 10	<input type="checkbox"/> Form 1042-S/FATCA, Tue. Dec. 11
SAN FRANCISCO	<input type="checkbox"/> Form 1099, Thur. Nov. 8	<input type="checkbox"/> Form 1042-S/FATCA, Fri. Nov. 9
SEATTLE	<input type="checkbox"/> Form 1099, Mon. Nov. 5	<input type="checkbox"/> Form 1042-S/FATCA, Tue. Nov. 6

Please note: These classes do not cover the special tax reporting issues of securities firms, banks and other lenders, mutual funds, retirement plans or IRAs. If your needs are in these areas, please email office@cokala.com about custom training.

SEE MORE ABOUT CLASS CONTENT AND LOCATIONS at www.cokala.com. Register by filling out this form and emailing it to office@cokala.com -- or fax your registration form to Cokala at 734-428-0702 -- or mail it to Cokala Tax Group, PO Box 2224, Ann Arbor MI 48106-2224 -- or register by phone at 734-358-7875 or 734-629-5155. CPE credit information is posted at www.cokala.com.

PROGRAM FEE

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| <input type="checkbox"/> 1-DAY CLASS | <input type="checkbox"/> \$515 standard | <input type="checkbox"/> \$475 if paid 40 days prior to class | <input type="checkbox"/> \$465 attendee's company is a Cokala subscriber |
| <input type="checkbox"/> 1099 & 1042-S | <input type="checkbox"/> \$975 standard | <input type="checkbox"/> \$890 if paid 40 days prior to class | <input type="checkbox"/> \$880 attendee's company is a Cokala subscriber |
| registrant combines attendance at both of these 1-day classes at same location | | | |
| <input type="checkbox"/> 2-DAY 1042-S | <input type="checkbox"/> \$925 standard | <input type="checkbox"/> \$830 attendee's company is a Cokala subscriber | |
| <input type="checkbox"/> 3-DAY training | <input type="checkbox"/> \$1,295 standard | <input type="checkbox"/> \$1,200 attendee's company is a Cokala subscriber | |
| registrant combines attendance at 1-day 1099 class and 2-day 1042-S class at same location | | | |

3 or more from same company at same location? Call Cokala at 734-358-7875 for information about additional extra discount.

Name _____ Company/Institution _____

Email _____ Phone _____ Title or Department _____

Mailing Address _____

METHOD OF PAYMENT: Check enclosed Email invoice to me for payment Credit card/P-card:

Card number _____ Expiration date _____

Name on card (please print) _____

Email of cardholder (if different from registrant) _____

Signature of cardholder _____

COKALA

TAX INFORMATION REPORTING SOLUTIONS, LLC

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