



# Cokala Tax Group: 2017 FORM 1099 and 1042-S/FATCA Classes

**Form 1099 Tax Reporting for 2017:** 1-day class. Covers what is reportable and who is reportable for 2017, 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 2017 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 2017:** 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 payees including NEW forms required in 2017; presumption rules used in the absence of reliable documentation; tax withholding; revised Form 1042-S for 2017; Form 1042 report of withholding; IRS 2017 filing and payee statements.

**NEW 2-day class for 2017 Form 1042-S/Forms W-8/FATCA Tax Compliance:** With two full days of training, this new 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.

**SEE MORE ABOUT CLASS CONTENT AND LOCATIONS** at [www.cokala.com](http://www.cokala.com) Register by filling out this form and emailing it to [office@cokala.com](mailto: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](http://www.cokala.com)**

*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](mailto:office@cokala.com) about custom training.*

<b>BIRMINGHAM AL</b>	<input type="checkbox"/> Form 1099, Thur. Sept. 28	<input type="checkbox"/> Form 1042-S/FATCA, Fri. Sept. 29
<b>BOSTON</b>	<input type="checkbox"/> Form 1099, Mon. Oct. 23	<input type="checkbox"/> Form 1042-S/FATCA, Tue. Oct. 24
<b>CHARLOTTE</b>	<input type="checkbox"/> Form 1099, Mon. Sept. 25	<input type="checkbox"/> Form 1042-S/FATCA, Tue. Sept. 26
<b>CHICAGO</b>	<input type="checkbox"/> Form 1099, Tue. Sept. 19	<input type="checkbox"/> Form 1042-S/FATCA, Wed. Sept. 20
<b>CINCINNATI</b>	<input type="checkbox"/> Form 1099, Mon. Dec. 4	<input type="checkbox"/> Form 1042-S/FATCA, Tue. Dec. 5
<b>CLEVELAND</b>	<input type="checkbox"/> Form 1099, Wed. Sept. 13	<input type="checkbox"/> Form 1042-S/FATCA, Thur. Sept. 14
<b>DALLAS</b>	<input type="checkbox"/> Form 1099, Mon. Oct. 9	<input type="checkbox"/> Form 1042-S/FATCA, Tue. Oct. 10
<b>DETROIT</b>	<input type="checkbox"/> Form 1099, Mon. Sept. 11	<input type="checkbox"/> Form 1042-S/FATCA, Tue. Sept. 12
<b>DC (suburban Virginia)</b>	<input type="checkbox"/> Form 1099, Thur. Oct. 26	<input type="checkbox"/> Form 1042-S/FATCA, Fri. Oct. 27
<b>DC 2-Day 1042-S class</b>	<input type="checkbox"/> Tuesday August 8 and Wednesday August 9	
<b>PHILADELPHIA</b>	<input type="checkbox"/> Form 1099, Mon. June 12	<input type="checkbox"/> Form 1042-S/FATCA, Tue. June 13
<b>PHOENIX</b>	<input type="checkbox"/> Form 1099, Thur. Oct. 12	<input type="checkbox"/> Form 1042-S/FATCA, Fri. Oct. 13
<b>ST LOUIS</b>	<input type="checkbox"/> Form 1099, Thur. June 15	<input type="checkbox"/> Form 1042-S/FATCA, Fri. June 16
<b>SALT LAKE CITY</b>	<input type="checkbox"/> Form 1099, Thur. Dec. 7	<input type="checkbox"/> Form 1042-S/FATCA, Fri. Dec. 8
<b>SAN FRANCISCO</b>	<input type="checkbox"/> Form 1099, Thur. Nov. 9	<input type="checkbox"/> Form 1042-S/FATCA, Fri. Nov. 10
<b>SEATTLE</b>	<input type="checkbox"/> Form 1099, Mon. Nov. 6	<input type="checkbox"/> Form 1042-S/FATCA, Tue. Nov. 7

**PROGRAM FEE** (check all that apply)

- 1-DAY CLASS     \$490 standard     \$450 if paid 40 days prior to class     \$420 earlybird, paid by Mar. 15 for June class or paid by June 30 for any Fall class
- 1099 & 1042-S class at same location     \$930 standard     \$850 if paid 40 days prior to class     \$790 earlybird, paid by Mar. 15 for June class or paid by June 30 for any Fall class
- 2-DAY 1042-S     \$850 standard     \$790 if paid by April 30

*3 or more from same company at same location? Call Cokala at 734-358-7875 for 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 \_\_\_\_\_