

# Cokala Tax Group: 2019 FORM 1099 and 1042-S/FATCA Classes

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

**1-DAY Form 1099 and W-9 Tax Compliance Training for 2019** Updated for 2019 for changes in rules and instructions. Covers the 2019 Form 1099 reporting requirements (primary focus on Form 1099-MISC); federal backup withholding requirements applicable to certain 1099 reportable payments; IRS Form W-9, its function, requirements, and validity; statements for recipients; and IRS filing of Forms 1099 and the withholding reconciliation Form 945 (filing due dates and methods for 2019).

**1-DAY Form 1042-S / FATCA / Forms W-8 Tax Compliance Training for 2019** Updated for 2019 including changes made by Regulations published in December 2018. Basic tax compliance training for withholding U.S. tax, and reporting on IRS Form 1042-S, for payments to foreign entities and foreign individuals, under regulations for Internal Revenue Code chapter 3 ("withholding at source" on U.S.-sourced income payments) and chapter 4 ("FATCA" requirements of the Foreign Accounts Tax Compliance Act).

**2-DAY TRAINING on Form 1042-S Reportable Payments and Tax Withholding** Updated for 2019 including changes made by regulations published in December 2018. Covers all of the topics taught in our 1-day basic 1042-S class for withholding-at-source and FATCA compliance, PLUS additional training on income tax treaty benefits, reviewing W-8 series forms and Form 8233 for validity, and working through real-life examples of payment situations and the related forms for beneficial owner status (or reliance on presumption rules), federal income tax withholding and deposit, and preparation of Forms 1042-S and 1042

- BIRMINGHAM AL**     Form 1099, Thur. Sept. 26     Form 1042-S/FATCA, Fri. Sept. 27
- BOSTON**     Form 1099, Tue. Oct. 8 at the Residence Inn Boston-Cambridge hotel, Cambridge MA
- BOSTON 2-day 1042-S**  Wed. Oct. 9-Thur. Oct. 10 at the Residence Inn Boston-Cambridge hotel, Cambridge MA
- CHICAGO**     Form 1099, Mon. Dec. 2     Form 1042-S/FATCA, Tue. Dec. 3, both at at the Courtyard O'Hare hotel, Des Plaines IL
- CINCINNATI**     Form 1099, Thur. Dec. 5     Form 1042-S/FATCA, Fri. Dec. 6, both at Residence Inn Cinci Airport, Erlanger KY
- CLEVELAND**     Form 1099, Mon. Sept. 9     Form 1042-S/FATCA, Tue. Sept. 10, both at Courtyard Cleveland Airport, North Olmsted
- DALLAS**     Form 1099, Tue. Oct. 22     Form 1099, same class repeated on Fri. Oct. 25
- DALLAS 2-day 1042-S**  Wed. Oct. 23-Thur. Oct. 24
- DETROIT**     Form 1099, Wed. Sept. 11 at the Detroit Metro Airport Marriott hotel, Romulus MI
- DETROIT 2-day 1042-S**  Thur. Sept. 12-Fri. Sept. 13 at the Detroit Metro Airport Marriott hotel, Romulus MI
- DC 2-Day 1042-S class**  Wed. July 31-Thur. August 1 at the Courtyard Dunn Loring Fairfax hotel, Vienna VA
- PHOENIX**     Form 1099, Wed. Dec. 11 at the Courtyard Phoenix Airport hotel, Phoenix AZ
- PHOENIX 2-day 1042-S**  Thur. Dec. 12-Fri. Dec. 13 at the Courtyard Phoenix Airport hotel, Phoenix AZ
- RALEIGH-DURHAM**     Form 1099, Mon. Sept. 23     Form 1042-S/FATCA, Tue. Sept. 24, both at Courtyard Raleigh-Durham Airport, Morrisville
- SAN FRANCISCO**     Form 1099, Thur. Nov. 7     Form 1042-S/FATCA, Fri. Nov. 8
- SEATTLE**     Form 1099, Tue. Nov. 5 at the Courtyard Marriott Seattle Sea-Tac hotel in Tukwila WA

*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.*

PROGRAM FEE

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

