

Cokala Tax Group: 2020 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 2020 *Updated for 2020 for major changes in forms and instructions.* Primary focus on the REVISED Form 1099-MISC and NEW Form 1099-NEC; IRS Form W-9; federal backup withholding of 24% required on certain 1099 reportable payments; Form 1099 statements for recipients; IRS filing of Forms 1099 and the withholding reconciliation Form 945; IRS CP2100 "B Notice" and 972-CG proposed penalty notice.

1-DAY Form 1042-S / FATCA / Forms W-8 Tax Compliance Training for 2020 *Updated for 2020* including recent final and proposed Regulations. 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 2020* including recent final and proposed Regulations and amendments to income tax treaties. 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.

- BOSTON** Form 1099, Tue. Sept. 15 at the Residence Inn Boston-Cambridge hotel, Cambridge MA
- BOSTON 2-day 1042-S** Wed. Sept. 16-Thur. Sept. 17 at the Residence Inn Boston-Cambridge hotel, Cambridge MA
- CHICAGO** Form 1099, Tue. Oct. 27
- CHICAGO 2-day 1042-S** Wed. Oct. 28-Thur. Oct. 29
- CLEVELAND** Form 1099, Mon. Aug. 31 Form 1042-S/FATCA, Tue. Sept. 1, both at Courtyard Cleveland Airport, North Olmsted
- DALLAS** Form 1099, Tue. Dec. 1 Form 1099, same class repeated on Fri. Dec. 4
- DALLAS 2-day 1042-S** Wed. Dec. 2-Thur. Dec. 3 [All Dallas classes at the DFW Airport Marriott hotel]
- DETROIT** Form 1099, Wed. Sept. 2 Form 1042-S/FATCA, Thur. Sept. 3
- DC** Form 1099, Tue. July 28 at the Courtyard Dunn Loring Fairfax hotel, Vienna VA
- DC 2-Day 1042-S class** Wed. July 29-Thur. July 30 at the Courtyard Dunn Loring Fairfax hotel, Vienna VA
- PHOENIX** Form 1099, Mon. Sept. 28 Form 1042-S/FATCA Tue. Sept. 29, both at Courtyard Phoenix Airport hotel
- RALEIGH-DURHAM** Form 1099, Tue. Oct. 13 Form 1042-S/FATCA, Wed. Oct. 14, both at Courtyard Raleigh-Durham Airport, Morrisville
- SAN FRANCISCO** Form 1099, Thur. Oct. 1 Form 1042-S/FATCA, Fri. Oct. 2

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 _____



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