

Cokala Tax Group: 2020 FORM 1099 and 1042-S/FATCA Classes

Updated Schedule July 2020: Training Live online in real time. Register at 734-358-7875, by email or mail.

Your registration and participation in tax compliance training classes with Cokala includes three months of followup Q&A support from Cokala on the 1099 or 1042-S topics covered in your Cokala class.

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 Basic 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 Enhanced Training for 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.

ONLINE CLASSES: Live online in real time. Note starting time (some at 9 am Eastern; some at Noon Eastern/9 Pacific)

Online class times are stated in Eastern time. All online classes take a midmorning break, 1-hour lunch break and midafternoon break.

- 1-DAY 1099**
 - Tue. Sept. 15, 9 am-3:30 pm Tue. Oct. 13, 12 noon-6:30 pm Mon. Nov. 23, 9 am-3:30 pm Tue. Dec. 8, 9 am-3:30 pm
 - Online class fee, 1-day class: \$380 standard \$342 attendee's company is a Cokala subscriber
- 1-DAY BASIC 1042-S**
 - Thur. Sept. 17, 9 am-3:30 pm Tue. Nov. 10, 12 noon-6:30 pm
 - Online class fee, 1-day class: \$380 standard \$342 attendee's company is a Cokala subscriber
- 2-DAY ENHANCED 1042-S**
 - Tue. Aug. 11 & Wed. Aug. 12, 9 am-3:30 pm Tue. Oct. 20 & Wed. Oct. 21, 12 noon-6:30 pm
 - Online class fee, 2-day class: \$760 standard \$684 attendee's company is a Cokala subscriber

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.

COKALA is a tax technical information services firm offering experienced and practical help in meeting your obligations for tax withholding, payee documentation and tax information reporting. These tax compliance classes are taught by Marianne Couch, JD, one of the founding partners of Cokala Tax Group. She is a frequent lecturer at major tax conferences and the author of the *Master Guide to Form 1099 Compliance* and *Master Guide to Form 1042-S Compliance*. Marianne served on the IRS Information Reporting Program Advisory Committee (IRPAC), where she was Chair of the IRPAC Subcommittee on Small Business and Self-Employed (SBSE) tax issues. She received her JD, cum laude, from the Michigan State University School of Law, and is a member of the State Bar of Michigan. CPE credit information for these classes is posted at www.cokala.com.

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 _____

