

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 regulations 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, both at the Courtyard Birmingham Homewood hotel
- 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 [All Dallas classes at the DFW Airport Marriott hotel]
- 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, at the Courtyard San Francisco Airport hotel (San Bruno)
- 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

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| <input type="checkbox"/> 1-DAY CLASS | \$515 standard | \$475 if paid 40 days prior to class | \$465 attendee's company is a Cokala subscriber |
| <input type="checkbox"/> 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 | | | |
| <input type="checkbox"/> 2-DAY 1042-S | \$925 standard | \$830 attendee's company is a Cokala subscriber | 3 or more from same company at same location? Call Cokala at 734-358-7875 for information about additional extra discount. |
| <input type="checkbox"/> 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 | | | |

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 _____

