



# Phoenix Tax Workshop

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*Rev. 8/07*

The next regular monthly meeting of the Phoenix Tax Workshop will be held Saturday, **January 12, 2008** from 9:00 a.m. until 12:00 noon. Guests/Non-members are welcome with advance notice and a \$60.00 fee.

## TODAY'S FOCUS

### ARIZONA INCOME TAX UPDATE/FILING ISSUES/ LATE IRA ROLLOVER

**A. DISCUSSION OF CURRENT DEVELOPMENTS.** Current tax issues, recent significant tax and business events, and practitioner comments will be reviewed and discussed.

**Ira S. Feldman, CPA**  
Chairman, Phoenix Tax Workshop  
[ira@aztax.org](mailto:ira@aztax.org)

**NOTE:** please e-mail any topics of a current event nature to Ira if you would like to have it included in the discussion.

**B. FILING ISSUES FOR THIS TAX SEASON.** Our speaker, who is one of our favorite requests, will update us on IRS tax season issues which will help us better serve our clients and “survive” the season.

**George Lopez**  
Sr. Stakeholder Liaison  
Internal Revenue Service  
[George.d.lopez@irs.gov](mailto:George.d.lopez@irs.gov)

**C. FOREIGN BANK ACCOUNT REPORTING—WHY IT IS IMPORTANT TO BE PRECISE.** The Form TD F 90-22.1 has become more “prominent” with the global economy and search for security. Our speaker will give us a primer on how to correctly file this form and what is done with it.

**TBA**

- D. ARIZONA INCOME TAX UPDATE.** Our Advisory Board Member, will review the significant changes which occurred this year with legislative, ADOR, and court activity.

**Edward Zollars, CPA**  
Thomas & Zollars, Ltd.  
[ed@hmtzcpas.com](mailto:ed@hmtzcpas.com)

- E. NO WAIVER FOR LATE ROLLOVER OF IRA DUE TO ERROR.** IRS may grant a penalty waiver for IRA rollover miscues. But this situation wasn't one of them. What "excuse" works?

**Ref: PLR 200736036**

**Nanette Merritt, CPA**  
Sarvas, King & Coleman, P.C.  
[nmerritt@skccpa.com](mailto:nmerritt@skccpa.com)

- F. PRACTICAL APPROACH TO COACHING YOUR CLIENTS ON M & E.** Or, more simply, how to avoid never being invited to your client's "Super Bowl suite!"

**TBA**  
Thomas & Zollars, Ltd.  
[ed@hmtzcpas.com](mailto:ed@hmtzcpas.com)

#### **2007-2008 MEETING SCHEDULE**

<b>September 15, 2007</b>	<b>October 20, 2007</b>
<b>November 17, 2007</b>	<b>January 12, 2008</b>
<b>February 16, 2008</b>	<b>April 26, 2008</b>
<b>May 17, 2008</b>	<b>June 21, 2008</b>

#### **GENERAL INFORMATION:**

Our meetings are held at the ASU Extended Learning Facility (formerly the Mercado) in Downtown Phoenix, at the corner of Monroe and 5<sup>th</sup> Street. Parking will be validated for parking at the Heritage Square parking lot (same as used for the Science Center). Enter on the south side of Monroe between 5<sup>th</sup> Street and 7<sup>th</sup> Street, just across the street from the facility. The meeting location will be posted on the marquee just inside the lobby (most are scheduled for Room C368/370 on the 3<sup>rd</sup> floor).