

2:5th Annual IRS-SJSU Small Business Tax Institute

June 22, 2017

8:00 am – 4:30 pm

Biltmore Hotel, Santa Clara

Thriving in the Digital Economy – Best Practices for Small Businesses and their Tax Advisers

Time	Topic	Presenters
8:00 – 8:20	Breakfast and Networking Registration	
8:20 – 8:30	Welcome	Vivienne Antal, IRS Stakeholder Liaison SB/SE Annette Nellen, SJSU
8:30 – 10:10	How to Successfully Deal with Correspondence Audits and IRS Notices A review of the process, relevant IRM procedures, types of audit letters and notices, how to get help, and more.	Caroline Chen, Esq., Professor, SJSU – moderator Susan Clark, Tax Policy Analyst, IRS Torie Charvez, EA Barbara Doherty, Esq., The Law Offices of Barbara Doherty Gail Murphy, Exam Analyst, IRS HQ Exam Field & Campus Policy
10:10 – 10:20	Break	
10:20 – 11:10	Digital Security – Expanding Your Technical Awareness Understanding your technology to avoid weaknesses and problems. What should you be aware of and checking regularly?	John Giordano, Cybersecurity Account Executive, SecureWorks Neal McCarthy, Cyber Security Incident Response Consultant, SecureWorks Sean McLean, PMP, IT Director, Petrinovich Pugh & Company LLP – moderator
11:10 – noon	FTB Taxpayer Advocate	Susan Maples, CPA FTB Taxpayers’ Rights Advocate
Noon – 1	Lunch and Networking	
1 – 2:40	Crowdfunding Explanation and federal and state tax matters with a variety of scenarios.	Andy Mattson, CPA, Partner, Moss Adams LLP Curtis N. Miyaji, CPA, Sr. Manager, Moss Adams LLP Dawn Rhea, Director, National Tax, Moss Adams LLP

2:40 - 2:50	Break	
2:50 – 3:40	IRS Future State Learn about the IRS' proposed new system for tax administration "to move the entire taxpayer experience to a new level." How will this affect you and your clients?	Vivienne Antal, Senior Stakeholder Liaison, IRS Claudia Hill, EA, TaxMam, Inc. Gerry Kelly-Brenner, Senior Stakeholder Liaison, IRS
3:40 – 4:30	Mid-year Tax Update State of the tax law and prospects for the balance of the year	Joel Busch, CPA, Esq., Professor, SJSU Annette Nellen, CPA, CGMA, Esq., Professor, SJSU