



NOVEMBER HYBRID LUNCHEON PROGRAM

“HOW TO AVOID AND WHAT TO DO IF AUDITED BY THE IRS”

TUESDAY, NOVEMBER 8, 2022

THE UNION LEAGUE
140 SOUTH BROAD STREET
PHILADELPHIA, PA 19102

11:45 – 12:00 P.M. REGISTRATION
12:00 – 12:30 P.M. LUNCHEON
12:30 – 1:45 P.M. PROGRAM

COFFEE MEET AND GREET:

The DEI Committee has organized a meet and greet coffee station prior to our luncheon program. The event will be held in the Farragut Room (adjacent to Lincoln Hall on the Broad Street side of the main meeting room) from 11:30 a.m.-12:00 p.m. All meeting attendees are welcome to join us!

A brief background on the IRS organization as it relates to the IRS Estate and Gift Tax Program and issues are presented to provide the participant with insight into the various silos and different cultures associated with business appraisal issues at the IRS. The processes of both the national and local classification process in Estate and Gift tax is presented and issues related to an examination are explored to provide insight of what to do to avoid an audit and what to do with any conflict using neuroscience. The insights from neuroscience may be applicable to resolving any conflict and negotiating winning solutions by taking advantage of The Collaboration Effect.

Participants will be able to:

- Address pertinent changes at the IRS
- Describe how the IRS works and how to work with this IRS
- Communicate how classification works at the IRS on estate and gift tax audits, and how to avoid an audit
- Identify how to work with IRS personnel if audited
- Apply The Collaboration Effect and three bonus items

**One Education Credit for CLE (PA Only), Insurance (PA Only), CFP,
CPA (PA Only), PACE and CTFA will be offered.**

Speaker:

Michael Gregory, ASA, CVA focuses on helping resolve conflict with the IRS, negotiating winning solutions, and helping organizations be more productive and grow faster by taking advantage of The Collaboration Effect®. Prior to founding his consulting firm, Mike had 28 years of experience with the IRS in a variety of capacities from specialist to executive level. During his last 11 years with the IRS, Mike was an IRS territory manager with responsibilities for up to twenty-three states with an emphasis in business valuation and specialist issues nationally. Mike has been working with neuroscientists for over nine years and he has written 12 books focusing on IRS issues business valuation, conflict resolution, servant leadership, and his most recent book *The Collaboration Effect*. Mike has a BS from Valparaiso University, a MS from the University of Wisconsin – Madison and an MBA from DePaul University.

The Philadelphia Estate Planning Council does not render any legal, accounting or other professional services. The Council's programs and publications are designed solely to help professionals maintain their professional competence. In dealing with specific matters, the individual using any publication obtained through the Council or any information orally conveyed by speakers at programs sponsored by the Council or in materials distributed by the Council should research original sources of authority independently.

**NOVEMBER 8, 2022 HYBRID LUNCHEON PROGRAM
REGISTRATION FORM**

Luncheon Program Fee:

PEPC Members (In-Person OR Virtual): \$45 Non-Members (In-Person OR Virtual): \$65

Additional Fees:

CLE Credit (Members)	\$15	CLE Credit (Non-Members)	\$15
Insurance Credit (Members)	\$15	Insurance Credit (Non-Members)	\$15
CFP® Credit (Members)	\$15	CFP® Credit (Non-Members)	\$15

\$5 additional charge for walk-in registrations at the door without pre-registration.

No-shows will be billed. No refunds after November 4, 2022

ATTENDEE INFORMATION:

Name: _____ Discipline: _____

Company: _____

Address: _____

City, State, Zip: _____

Phone: _____ Email: _____

PEPC Member (\$45 per person) Non-Member (\$65 per person)

Participation Type: In-Person Meeting Virtual Meeting

Please select your lunch entrée:

French Cut Chicken Breast, Sweet Potato Puree, Kale, Apple Chicken Jus

Penne Pasta, Charred Peppers, Broccoli Rabe, White Beans, Light Garlic Jus

Special Dietary Needs: _____

CONTINUING EDUCATION INFORMATION:

(Fee: \$15 per Credit)

Continuing Legal Education (1 credit).....Attorney ID: _____

Insurance Continuing Education (1 credit).....License Number: _____

CFP® Continuing Education (1 credit).....Last 4 Digits of SSN: _____

CTFA, PACE and CPA Credits available onsite at the meeting at no additional charge.

PAYMENT INFORMATION:

Check Payment (Payable to PEPC)

Credit Card Payments – **Website Only**

PEPC is no longer accepting credit card payments via faxed or mailed registration forms. Any credit card payments must be submitted through our secure website at www.philaepc.org. **Members must be logged into the site to receive the discounted member pricing.**

Return by Mail: Philadelphia Estate Planning Council, P.O. Box 579, Moorestown, NJ 08057

Return by Fax: 856-727-9504

Register Online: www.philaepc.org

Questions: 215-486-6215 (*Registrations will not be accepted via phone*)