

BAKERSFIELD TAXPAYER SERVICE DAY

MARCH 31, 1999

9:00 am Opening Session **Bakersfield College, Indoor Theater**
Welcome **Dean Andal**, Vice-Chairman, Board of Equalization
James Maples, Assessor/Recorder, Kern County
Panel Discussion **What's New at BOE, EDD, FTB and IRS**
Jim Speed, Deputy Director, Sales and Use Tax Department, Board of Equalization
Robert Sertich, Deputy Director, Tax Branch, Employment Development Department
Brian Toman, Chief Council, Franchise Tax Board
Edward Chavez, Assistant District Director, Central California District, Internal Revenue Service

PRESENTING AGENCY	WORKSHOPS – 10:00 AM, 11:00 AM, 12:30 PM, 1:30 PM, AND 2:30 PM	HUMANITIES CLASSROOM
BOE, EDD, FTB, IRS	Audits and Appeals A panel discussion of the audit programs for the four major tax agencies and the appeal process available to taxpayers in those agencies.	19 12:30 pm
	Taxpayers' Rights Advocates - Problem Resolution Process As a California taxpayer, you have many protections under various Taxpayers' Bills of Rights. Come and hear about these important provisions of law and how they may apply to you and/or your business during the assessment and collection processes. Learn how to avoid the most common errors that cause future difficulties.	Indoor Theater 2:30 pm
Board of Equalization (BOE)	Return Preparation Discussion of the preparation of a typical sales and use tax return. Discussion will include common errors and misunderstandings.	12 10:00 am & 12:30 pm
	Understanding Your 1999 Business Property Statement Understanding and filing the annual Business Property Statement. An explanation of who should report, what, how and when to report. Property valuation, audit, appraisal and appeals will also be explained.	21 11:00 am & 1:30 pm
	Use Tax/ Exemptions Discussion will include the definition and application of the California Use Tax. Exemptions and exclusions from the tax will also be discussed.	12 11:00 am & 1:30 pm
Cal/OSHA	What Is OSHA All About? Discussion to include benefits of consultation service through Cal/OSHA, cost benefit of maintaining effective Illness/ Injury Prevention Program and applicable regulations for all employers.	19 10:00 am & 1:30 pm
Central California Escrow	Resale Escrow Process Discussion will include processing of an escrow for a bulk sale and interaction with different regulatory agencies.	5 10:00 am & 12:30 pm
City of Bakersfield	Business License, Tax and Permit Requirements Discussion will cover business license/tax and various regulatory permits required to transact and carry on business within the City of Bakersfield.	14 10:00 am & 12:30 pm
Employer's Training Resource	Work Force Preparation for the 90s Presentation will cover employment trends of the 90s, training available for inexperienced and unprepared job seekers due to welfare reform, contacts for employers.	6 11:00 am & 1:30 pm
Employment Development Department (EDD)	Employee vs. Independent Contractor Discussion will cover definitions of an employee, identify common-law factors and provide resources to facilitate more informed business decisions.	14 11:00 am & 1:30 pm
Franchise Tax Board (FTB)	Options Available to Resolve Your Tax Debt The review will include a discussion on how to qualify for an installment agreement, the <i>new</i> Installment Agreement application, and processing the application. The review will also include a discussion on how to qualify for an Offer in Compromise, the <i>new</i> Offer in Compromise application, processing and evaluating the application and recent developments.	15 12:30 pm

INFORMATION BOOTHS – HUMANITIES QUAD AREA (10:00 am to 3:30 pm)

Staff from participating agencies will be available to answer questions vital to the operation of your business.

Franchise Tax Board (FTB)	State Income Tax and Small Business Discussion will include information on incorporating, recordkeeping and other commonly asked questions. Lecture will be aimed at income tax filing requirements for partnerships, sole proprietors, S corporations and C corporations.	13 10:00 am & 12:30 pm
Internal Revenue Service (IRS)	Collection Appeals Discussion will include remedies available to taxpayers regarding IRS "Notice of Intent to Levy," "Notice of Levy" and "Notice of Filing Federal Tax Lien".	15 10:00 am
	Electronic Filing Discussion will include instructions on electronic filing of Form 1040 and authorized locations set up to serve taxpayers.	15 11:00 am
	Electronic Deposit: 941 Filing Discussion will include instructions on mandatory electronic filing of payroll taxes and advantages involved.	15 1:30 pm
Kern County Environmental Health	Permitting Requirements Discussion will include overview of permitting processes and requirements for businesses operating under their jurisdiction in Kern County.	20 10:00 am & 12:30 pm
Permit Assistance Center	Business Start Up Discussion will cover help available on obtaining licenses and permits needed to start a particular business, information on Cal/GOLD (on-line business start-up information).	20 11:00 am & 1:30 pm
Service Corps of Retired Executives (SCORE)	Small Business and Y2K Discussion will include information the business owner needs in preparing for the Year 2000.	6 10:00 am & 12:30 pm
Small Business Development Center/Small Business Administration (SBA)	How To Get Certified: WBE & MBE/Financing Options Discussion of how to get certified as a woman or minority business owner and benefits of it, and financing options available for small business owners.	5 1:30 pm
	How To Start A Business/Financing Options Discussion of financing options available for small businesses and business start-up information.	5 11:00 am
Social Security Administration	Verifying Social Security Numbers and Wage Reporting Discussion will cover verification process of Social Security cards and numbers, both through the local agency and nationwide pilot program.	21 10:00 am & 12:30 pm
Society of Enrolled Agents	Preparing for an Audit Discussion will cover typical questions asked by IRS auditors in initial interview, the process of incorporating general ledger information into tax returns, the necessity of receipts and adequate record keeping and the audit appeals process.	3 11:00 am & 1:30 pm
	Basic Bookkeeping Discussion will cover various methods of bookkeeping, the difference between cash and accrual basis bookkeeping, and necessary records for compliance with various federal, state and local agencies.	3 10:00 am & 12:30 pm
State Compensation Insurance Fund (SCIF)	Preparing for a Workers' Compensation Audit Discussion will cover expectations in an audit, preparation for an audit, questions to anticipate, use of Clerical and Outside Sales class codes, how to identify an independent contractor and necessary documentation needed.	4 11:00 am & 1:30 pm
	General Claims Discussion will cover basics of claim reporting procedures, how to manage and control workers' compensation costs and questions to ask Workers Compensation Carriers.	4 10:00 am & 12:30 pm
U.S. Department of Immigration and Naturalization (INS)	Audits of I-9 Discussion will include employer responsibilities, completion of the I-9, fraudulent documents and applicable fines.	13 11:00 am & 1:30 pm

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