

STOCKTON TAXPAYER SERVICE DAY

MARCH 18, 1999

8:30 am Opening Session **McCaffery Auditorium**
Welcome **Dean Andal**, Vice-Chairman, Board of Equalization
Gary Freeman, San Joaquin County Assessor
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
Peggy Rule, Acting District Director, Northern California District, Internal Revenue Service

PRESENTING AGENCY	WORKSHOPS – 10:00 AM, 11:00 AM, 12:30 PM, 1:30 PM, AND 2:30 PM	WENDELL PHILLIPS
BOE, EDD, FTB IRS	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.	McCaffery Auditorium 2:30 pm
Better Business Bureau	Building Customer Loyalty Through Ethics and High Standards Keeping your customers coming back is key to long term survival in a highly competitive market.	224 11:00 am
Board of Equalization (BOE)	General Exemptions and Return Preparation What deductions can I claim? What documentation is needed to support my deductions? What are some of the most common deductions? Must I file a return? How do I prepare a return? 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. What to Expect in an Audit Why was I selected? What is the audit objective? How to get through the audit quickly. What if I disagree with the audit? (Appeals Process)	123 10:00 am & 11:00 am 123 1:30 pm 123 12:30 pm
Cal EPA Permit Assistance Center	Business Permits Made Simple California Government On-line to Desktops.	213 1:30 pm
Cal OSHA	Cal OSHA Requirements for Employers Applicable workplace safety and health regulations for all employers.	224 12:30 pm
Consumer Credit Counseling	Financial Preparation for the Small Business Learn to avoid pitfalls often associated with business ownership — before they happen to you. Learn the steps to take to achieve and maintain financial solvency. Learn how your credit report affects your ability to obtain business loans.	219 10:00 am
Employment Development Department (EDD)	Employee or Independent Contractor Employee or Independent Contractor? How do I tell the difference? Reporting Requirements A definitive explanation of who should report, what, how and when it should be reported. Unemployment Insurance Reserve Account and Major Tax Topics How the unemployment rate is established. What is a reserve account and how to minimize Unemployment Insurance cost.	213 10:00 am 213 11:00 am 213 12:30 pm
Franchise Tax Board (FTB)	Forms of Business A brief description of the various forms of business (i.e. sole proprietor, corporation partnerships, etc.) that are selected by taxpayers. State Income Tax and Small Business Is it necessary to incorporate? What types of records do I need to keep? These and other commonly asked questions will be answered during a lecture aimed at the income tax filing requirements for partnerships, sole proprietors, S corporations and C corporations.	122 10:00 am & 1:30 pm 122 11:00 am

INFORMATION BOOTHS – WENDELL PHILLIPS CENTER (10:00 am to 3:00 pm)

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

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.	219 1:30 pm
Immigration & Naturalization Service (INS)	Is Your Employee Eligible to Work in the United States? Discussion of the provision of the Immigration Reform and Control Act (IRCA) of 1986 including I-9 Form completion and retention, and documentation for employment. Employer Verification Program and on-line verification of eligibility to work in the U.S. will be covered.	224 10:00 am
Internal Revenue Service (IRS)	Federal Taxes and the Small Business Person The session will discuss forms of business: how best to structure your business to accomplish your goals, and recordkeeping: forms of records and accounting methods.	140 1:30 pm
Secretary of State	Business Filings Overview What is required to create a corporation, limited partnership, limited liability partnership or general partnership? What other documents are required to be filed by these entities? What are the common pitfalls when filing these documents?	122 12:30 pm
Small Business Administration (SBA)	Small Business Financing for the New Millennium Qualifications for SBA loans. How to get a Banker to say "yes." What resources are available?	219 11:00 am
State of California Industrial Relations	Know Your Labor Laws Bringing about compliance is very important to your highly visible industry. The Division of Labor Standards Enforcement is committed to educational outreach efforts in order to avoid future labor law violations.	219 12:30 pm
Stockton Department of Rehabilitation	Incentives for Hiring Workers with Disabilities The benefits of hiring workers with disabilities including increased attendance and productivity, tax credits and on the job training agreements which reimburse training costs.	224 1:30 pm

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