

# Auditing IRS Reporting

WEBINAR OR ON-DEMAND WEB LINK  
(LINK INCLUDES FREE CD ROM)

**Thursday, October 27, 2011**

12 - 1:30 pm PT  
1 - 2:30 pm MT  
2 - 3:30 pm CT  
3 - 4:30 pm ET

Year end is fast approaching and it will soon be time to prepare Forms 1042-S, 1098s, 1099s, and 5498s. If you dread this, you are not alone. It sometimes seems as if the IRS rules are ever-changing and increasingly difficult. Join us to learn the most common requirements for financial institutions and common-sense ways to help ensure accurate reporting. This webinar will help you to be better prepared for year-end reporting. As an added benefit, some of the audit techniques may help your bank better monitor for certain types of fraud.

Continuing Education: Attendance verification for CE credits provided upon request.



## HIGHLIGHTS

- Resources – where to find information
- Whose TIN should be used?
- Which certification form should be obtained?
- Forms 1042-S and the myriad of 1098s, 1099s, and 5498s
  - What is reportable?
  - When and to whom?
  - Proper completion
  - Transmittal form used
- Audit tips to help ensure accuracy

## WHO SHOULD ATTEND?

This informative session is for senior bank management, compliance officers, internal auditors, and any staff involved with IRS information reporting.

## **MEET THE PRESENTER**

**Rhonda Hudson,  
Compliance +, Inc.**



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**To view prices or register please return to the  
webinar listing page, and click on the link to register.**

# Community Bankers Association of Oklahoma REGISTRATION FORM

Date of Seminar	Name of Seminar	Live Webinar \$230	On-Demand Link & Free CD Rom \$230	Both Live Webinar & On-Demand Link (includes free CR Rom) \$350	TOTAL
					\$

**\*CD Rom for pc use only**

Name: \_\_\_\_\_ Bank: \_\_\_\_\_

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Email: \_\_\_\_\_ (Email address is required.)

**Hook up instructions and seminar materials will be emailed approximately  
7 days prior to the seminar.**

**REGISTRATION AND PAYMENT INSTRUCTIONS – Please note invoices are not provided.  
Mail registration form and check made payable to:**

Financial Education and Development, Inc., P.O. Box 1780, Helena, MT 59624

**Fax registration form, including credit card number to (406) 442-2357.**

**Important Note if Paying by Credit Card:** This form will serve as your receipt. Charges will show up on your credit card statement from Financial Education and Development, Inc.

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**\*NOTE: It is best to have all payments and registrations to us 10 days prior to the seminar to ensure timely receipt of hook up instructions and handout materials. We will do our best to accommodate late registrations.**

FOR QUESTIONS EMAIL: [CBAO@financialedinc.com](mailto:CBAO@financialedinc.com)

FAX: (406) 442-2357