**The 2020 New England IRS Representation Conference**

**November 20, 2020**

**The 2019 New England IRS Representation Conference Number: Webcast: 15UFN-T-00146-20-O**

**Ethics Program Number: Webcast: 15UFN-E-00145-20-O**

**Seminar Evaluation Form**

**Please assign a number grade, using a 1-5 scale, with 5 being the highest.**

Poor Excellent

1) Was the seminar content organized and easy to follow? 1 2 3 4 5

2) Were the handout materials satisfactory? 1 2 3 4 5

3) Was the time allotted to learning adequate? 1 2 3 4 5

3) Were the stated learning objectives met? 1 2 3 4 5

3) Were the program materials accurate, relevant, and did  
 they contribute to the achievement of the learning objectives? 1 2 3 4 5

4) Please provide any comments about the webcast technology that may help us in evaluating our webcast partner:  
\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

5) What type of tax representation work would you like to advance in? (check all that apply)

**□** Installment Agreements **□** Non-Filer Representation  
**□** Trust Fund Recovery Penalties **□** Employment Taxes  
**□** Offers in Compromise **□** Penalty Abatement  
**□** Appeals **□** Audits  
**□** Responding notices **□** Forensic Accounting/Doc. Reconstruction  
  
Other (please specify) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

6) Please let us know any sponsors or exhibitors you would like to see at next year’s conference: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

7) How many tax clients to you have in your practice? \_\_\_\_\_Individuals \_\_\_\_\_ Small Business

**Please rate the panel presentations.**

Please assign a number grade, using a 1-5 scale, with 5 being the highest.

**IRS Enforcement Update**

***SB/SE and Collections***

**Were the speakers knowledgeable and effective?**

**Poor Excellent**

1. Eric Hylton 1 2 3 4 5
2. Moderator: Jeffrey M. Sklarz 1 2 3 4 5

Please provide any comments or suggestions for the panel: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

***Criminal***

**Were the speakers knowledgeable and effective?**

**Poor Excellent**

1. James Lee 1 2 3 4 5
2. Moderator: Kathy Keneally 1 2 3 4 5

Please provide any comments or suggestions for the panel: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

***Office of Chief Counsel***

**Were the speakers knowledgeable and effective?**

**Poor Excellent**

1. Michael Desmond 1 2 3 4 5
2. Moderator: Caroline D. Ciraolo 1 2 3 4 5

Please provide any comments or suggestions for the panel: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

***Fraud Enforcement***

**Were the speakers knowledgeable and effective?**

**Poor Excellent**

1. Damon Rowe 1 2 3 4 5
2. Carolyn Schenck 1 2 3 4 5
3. Moderator: Bryan Skarlatos 1 2 3 4 5

Please provide any comments or suggestions for the panel: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Ethical Issues When Representing the Accountant in an IRS Investigation (Ethics)**

**Were the speakers knowledgeable and effective?**

**Poor Excellent**

1. Miri Forster 1 2 3 4 5
2. Sara G. Neill 1 2 3 4 5
3. G. Michelle Ferreira 1 2 3 4 5
4. Moderator: Sanford Boxerman 1 2 3 4 5

Please provide any comments or suggestions for the panel: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**COVID-19 Update: Where Are We Now?**

**Were the speakers knowledgeable and effective?**

**Poor Excellent**

1. Phillip J. Wilson 1 2 3 4 5
2. James Grimaldi 1 2 3 4 5
3. Moderator: Jason A. Marsh 1 2 3 4 5

Please provide any comments or suggestions for the panel: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

***Lunch and Interview with Charles P. Rettig, IRS Commissioner***

**Were the speakers knowledgeable and effective?**

**Poor Excellent**

1. Charles P. Rettig 1 2 3 4 5
2. Moderator: Frank Agostino 1 2 3 4 5

Please provide any comments or suggestions for the panel: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

***Dealing with the Undocumented Worker***

**Were the speakers knowledgeable and effective?**

**Poor Excellent**

1. Megan Brackney 1 2 3 4 5
2. Josh O. Ungerman 1 2 3 4 5
3. Moderator: Lisa E. Perkins 1 2 3 4 5

Please provide any comments or suggestions for the panel: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

***Out For Money & Blood? How to Bring a Whistleblower Case***

**Were the speakers knowledgeable and effective?**

**Poor Excellent**

1. Walter Pagano 1 2 3 4 5
2. Lee D. Martin 1 2 3 4 5
3. Michael A. Villa 1 2 3 4 5
4. Moderator: Eric L. Green 1 2 3 4 5

Please provide any comments or suggestions for the panel: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

***Defenses to Tax Crimes: Attacking Willfulness***

**Were the speakers knowledgeable and effective?**

**Poor Excellent**

1. Sharon McCarthy 1 2 3 4 5
2. Anastasia King 1 2 3 4 5
3. Peter D. Hardy 1 2 3 4 5
4. Moderator: Frank Agostino 1 2 3 4 5

Please provide any comments or suggestions for the panel: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

***Docketed vs. Undocketed Appeals? A look at the case from the perspective of IRS Counsel and Appeals***

**Were the speakers knowledgeable and effective?**

**Poor Excellent**

1. Andrew Keyso 1 2 3 4 5
2. Erika Bradley Cormier 1 2 3 4 5
3. Diana L. Erbsen 1 2 3 4 5
4. Moderator: Jeffrey M. Sklarz 1 2 3 4 5

Please provide any comments or suggestions for the panel: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Thank you for taking the time to complete the evaluation form. Your feedback is very important to us.**