**2023 New England IRS Representation Conference Day 2**

**December 1, 2023**

**The 2022 New England IRS Representation Conference Number: In-Person:** **15UFN-T-00304-23-I**

**Ethics Program Number: In-Person: 15UFN-E-00305-23-I**

**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 venue that will help us in selecting future conference locations:  
\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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

8) Would you take advantage of a sleeping room block? \_\_\_\_\_Night before \_\_\_\_\_\_Night after

**Please rate the panel presentations.**

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

**IRS Update**

***B/SE Update with Mary Beth Murphy, Director of Collections, North Atlantic Territory* Were the speakers knowledgeable and effective?**

**Poor Excellent**

1. Mary Beth Murphy 1 2 3 4 5
2. Moderator: Jeffrey M. Sklarz 1 2 3 4 5

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

***Guy A. Ficco, Criminal Investigation Deputy Chief***

**Were the speakers knowledgeable and effective?**

**Poor Excellent**

1. Guy A. Ficco 1 2 3 4 5
2. Moderator: Kathy Enstrom 1 2 3 4 5

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

***Margaret Romaniello, Stakeholder Liaison***

**Were the speakers knowledgeable and effective?**

**Poor Excellent**

1. Margaret Romaniello 1 2 3 4 5
2. Moderator: Frank Agostino 1 2 3 4 5

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

***Enforcement Trends: What’s Hot and What’s Not***

**Were the speakers knowledgeable and effective?**

**Poor Excellent**

1. Daniel Mayo 1 2 3 4 5
2. Michelle F. Schwerin 1 2 3 4 5
3. Barbara T. Kaplan 1 2 3 4 5
4. Moderator: Megan Brackney 1 2 3 4 5

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

**Wages vs Distribution: What is Reasonable Compensation?**

**Were the speakers knowledgeable and effective?**

**Poor Excellent**

1. Paul S. Hamann 1 2 3 4 5
2. Sara G. Neill 1 2 3 4 5
3. Moderator: Eric L. Green 1 2 3 4 5

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

**Hidden Assets and Fraudulent Transfers: What Accountants Need To Watch For!**

**Were the speakers knowledgeable and effective?**

**Poor Excellent**

1. John Heller 1 2 3 4 5
2. Damon Rowe 1 2 3 4 5
3. Moderator: Jeffrey M. Sklarz 1 2 3 4 5

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

***Ethical Practice & The Dangers of Getting Too Close to Clients***

**Were the speakers knowledgeable and effective?**

**Poor Excellent**

1. Kathy Enstrom 1 2 3 4 5
2. Barry A. Fischman 1 2 3 4 5
3. Moderator: Guinevere M. Moore 1 2 3 4 5

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

***IRS Enforcement Around Employee Retention Credits***

**Were the speakers knowledgeable and effective?**

**Poor Excellent**

1. Elmer D. Smith 1 2 3 4 5
2. Jon Thibodeaux 1 2 3 4 5
3. James R. Grimaldi 1 2 3 4 5
4. Moderator: Kathy Enstrom 1 2 3 4 5

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

***Appealing the Denied Offer***

**Were the speakers knowledgeable and effective?**

**Poor Excellent**

1. Leighanne Lafrenz Nickle 1 2 3 4 5
2. Beverly L. Winstead 1 2 3 4 5
3. Moderator: Amanda Evans 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.**