

MINUTES OF WIN WIN MEETING
TUESDAY, JUNE 15, 2010 1:00 PM
1533 LAKEWOOD DR., MODESTO, CA 95355-3576

Purpose of this meeting: To enhance customer service and open lines of communication with Stockton, Modesto and other IRS offices through a Win-Win Group.

Attendance:

Connie Ferrell EA, Soulsbyville
Myrna Smith IRS, Stockton
Mark Roiland EA, Manteca
Robert Yockey EA, Ceres
Asma Mahmood EA, Modesto

Michael McGrath EA, Modesto
Martha Rodriguez IRS, Modesto
Marilyn Lim EA, Stockton
Beverly Woodward EA, Stockton

1. Welcome and introductions.
2. Minutes for May 18, 2010 were approved as presented.
3. Phil Laverty is on vacation. Wendy Yip is acting manager but is in the field today. Martha Rodriguez and reported on Modesto IRS office updates. Collections hired 4 new collectors in June 2009 but only one has finished the training. Three more were hired in February and are in training. The average case load is 35 to 50 cases per collector. They are seeing some \$1,000,000 cases. Also many first time collection cases on some taxpayers. Many collection issues for businesses are finding the business is closed and gone. Some taxpayers change name and FEIN to avoid collections. Collections pursues nominee liens (alter ego liens) when property has been transferred. Public records, such as county recorder records and social media networks are used to find and much information as possible about a taxpayer.
4. Myrna Smith from the IRS Stockton office reported that Terri Ford passed away and they are searching for a replacement. Patrick Lenny is acting field audit manager. Interviewing is going on for 6 Revenue Agent positions including 2 LMSB positions. The walk-n sites for Stockton and Modesto have a new manager John Johnson. Please add to email list for Win Win meetings and maybe he will be able to attend if in the area: John.Johnson@irs.gov. Stockton office audit is working 75 correspondence audits based on preparers. The returns have increased income on Schedule C with dependents and EITC. Respond to CP2000 letters using coupon and/or envelope to speed up response time. Discussion on MFJ and proving marriage. Discussion on dependents and getting Form 8332 signed. NOL carry-back issues are taken by field audit. IRS audits all new employees.
5. The topic for this month is Homebuyer credit and audit issues. These cases are being worked by office audit. The first clue that they may not qualify for the credit is finding mortgage interest claimed on Schedule A in immediately preceding 3 years.
6. Following is the meeting schedule for the year. We need topics and presenters please.

May 18, 2010	Stockton – Tax season wrap up and audit/collection trends
June 15, 2010	Modesto – Home buyer credits
July 20, 2010	Stockton – Net operating loss carry back, Hobby losses
August 17, 2010	Modesto – CPE credits, OPR requirements

September 21, 2010 Stockton – Mandatory efile and new PTIN number
October 19, 2010 Modesto –
November 16, 2010 Stockton –
December 14, 2010 Modesto – 2nd Tuesday instead of 3rd

7. Topics are needed for the 2010 meetings. Let us know your issues.

8. Adjourn

Respectfully submitted,
Connie Ferrell EA