

2024 FORM 1099 and 1042-S/FATCA Tax Compliance Training Classes

Attend Live-Online training with Cokala - New and updated training programs for 2024
Email your completed registration form to office@cokala.com or call 734-629-5155 for assistance

Full-day Live Online training programs

1-Day Form 1099 and W-9 Tax Compliance Training for 2024

Primary focus on IRS reporting compliance for Forms 1099-NEC and 1099-MISC; use of IRS Form W-9 and reliance on the W-9; federal backup withholding required on certain payments; and handling IRS Notices CP2100 and 972CG.

1-Day Form 1042-S / FATCA / Forms W-8 Tax Compliance Training for 2024 - Level 1

Compliance with requirements to determine status, withhold U.S. tax and file Form 1042-S for payments to foreign entities and foreign individuals; overview of W-8 series forms and Form 8233 certifications from non-U.S. payees.

1-Day Level 2 Form 1042-S Reportable Payments and Tax Withholding for 2024 - Level 2

Building on the basic knowledge base of the Level 1 class, Level 2 provides a deeper dive into claims of a reduced withholding rate under tax treaties; sufficiency reviews of the W-8 and 8233 forms; presumption rules for status when insufficient documentation is furnished; and paying foreign intermediaries, agents and partnerships.

Class fee for Full-day Live Online training (check the box which applies to your organization)

☐ \$440 standard fee per attendee

☐ \$402 per attendee when attendee's organization is a Cokala subscriber

Class selection:

☐ FORM 1099 on Tuesday, July 16

☐ FORM 1042-S Level 1 on Thursday, July 18

☐ FORM 1099 on Tuesday, October 15

☐ FORM 1042-S Level 1 on Thursday, October 17

☐ FORM 1042-S Level 2 on Tuesday, October 22

☐ FORM 1099 on Tuesday, November 19

☐ FORM 1042-S Level 1 on Thursday, November 21

☐ FORM 1042-S Level 2 on Tuesday, December 3

Please note: These classes do not cover the special tax reporting issues of securities firms, banks and other lenders, mutual funds, retirement plans or IRAs.

3-hour Live Online workshops

Each 3-hour workshop provides concentrated in-depth training on a specific topic of current compliance concern in Form 1099 and Form 1042-S tax information reporting and withholding.

Class fee for 3-hour Live Online Workshop (check the box which applies to your organization)

☐ \$240 standard fee per attendee

☐ \$215 per attendee when attendee's organization is a Cokala subscriber

Workshop selection:

☐ Thursday, April 18: Tax Treaties

☐ Thursday, June 20: Forms W-9 and W-8

☐ Thursday, August 15: Legal Settlement and Attorney Payment 1099 Reporting

Name Company/Institution

Email Phone Title or Department

Mailing Address

METHOD OF PAYMENT: ☐ Check enclosed ☐ Email invoice to me for payment ☐ Credit card/P-card:

Card number Expiration date

Name on card (please print)

Email of cardholder (if different from registrant)

Signature of cardholder

COKALA

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CPE credit information is posted on the Cokala website at www.cokala.com