

2014
SPEAKING ENGAGEMENTS

Rev. 12/04/2014

Event Date	Time	Organization	Event	City, State	Speaker
JANUARY 2014					
16-Jan-14	2:00- 3:30	IRS -SBSE Examniation	How to Deal with Representatives Effectively	Teleconference or Live Mtg.	Karen Hawkins
24-Jan-14	10:30 - 12:00	ABA Tax Meeting	Individual & Family Tax Committee Panel	Phoenix, AZ	Karen Hawkins
24-Jan-14	1:30 - 2:20	ABA-Standards of Tax Practice Committee	Government Perspective Panel-Ethical Issues in Federal Tax Practice	Phoenix, AZ	Karen Hawkins
24-Jan-14	4:30 - 5:30	ABA - Court Procedure & Practice Committee	CPP Conflicts Panel	Phoenix, AZ	Karen Hawkins
24-Jan-14	6:00- 7:00	ABA Tax Meeting	Bankruptcy & Workouts Committee Panel	Phoenix, AZ	Karen Hawkins
24-Jan-14	7:00 - 7:30	ABA Tax Meeting	Tax Exempt Orgs.	Phoenix, AZ	Karen Hawkins
28-Jan-14	11:45-1:15	Young Tax Lawyers	Annual Meeting	San Francisco, CA	Karen Hawkins
29-Jan-14	2:00 - 3:00	IRS - TEGE	Ethics Phone Forum	Teleconference/Phone Forum	Karen Hawkins
29-Jan-14	3:00 - 4:00	Rutgers University	Regulation of Tax Practice	via Phone	Karen Hawkins
FEBRUARY 2014					
6-Feb-14	2:00-3:00	IRS - TEGE	(Rebroadcast) Ethics Phone Forum	Teleconference/Phone Forum	Karen Hawkins
7-Feb-14	2:00- 4:30	Western States Bar Liaison Mtg.	OPR Presentation	Conference Call/ Q&A	Karen Hawkins
19-Feb-14	12:00 - 1:00	University of Florida Tax Institute	CLE Conference and UF Graduates in Tax Practice - Luncheon Speaker	Tampa, FL	Karen Hawkins
MARCH 2014					
5-Mar-14	11:00 - 11:30	NASBA -Nat'l. Assoc. of State Boards of Accountancy	ED/LC Conference Executives Directors Presentation	Savannah, GA	Lee Martin
5-Mar-14	2:00 - 3:00	NASBA -Nat'l. Assoc. of State Boards of Accountancy	ED/LC Conference - Legal Counsel Presentation	Savannah, GA	Lee Martin
27-28-Mar-14	11:00 - 12:15 8-9:15, 11-12:15	Nat'l. Assoc. of Bond Lawyers - Tax & Securities Law Institute	OPR Presentation/Circular 230	Boston, MA	Karen Hawkins
End Month		Ethical Standards	Archived Stats	Video Portal	
2nd Qtr		Circular 230	Archived Stats	Video Portal	
2nd Qtr		A Message from OPR	Archived Stats	Video Portal	
2nd Qtr		Key Circular 230 Provisions: What Every Tax Return Preparer Needs to Know (2012 Tax Forum Seminar)	Archived Stats		
2nd Qtr		What Every Tax Return Preparer Needs to Know: Key Circular 230 Provisions (2013 Tax Forum Seminar)	Archived Stats		

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2nd Qtr		An Overview of Circular 230 and the Office of Professional Responsibility (OPR) for New Tax Professionals (2013 Tax Forum Seminar)	Archived Stats		
APRIL 2014					
24-Apr-14	9:30-10:15	Latino Assoc. of Tax Preparers Inc.	OPR Presentation/Circular 230	Bronx, NY	Karen Hawkins
25-Apr-14	3:30 - 4:45	Florida Bar Tax Section	(CLE) "When Your License to Practice Before the IRS is on the Line; CAF, Circular 230	Orlando, FL	Takisha McGee
25-Apr-14	Noon	New York Law School - FATF Symposium & LL.M Professional Responsibility	Presentation to Taxation students on Standards of Practice, professional responsibility, challenges of tax practice	New York, NY	Karen Hawkins
29-Apr-14	12:30 - 2:00	US Tax Court	Informal Lunch & Learn w/law clerks	Washington DC	Karen Hawkins

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MAY 2014					
5-May-14	11:00 - 12:00	CA State Bar/LA County Bar	Annual delegation mtg. w/IRS/OPR	Main IR	Karen Hawkins & Senior staff
6-May-14	2:00 - 3:30	AICPA - TPRC -Tax Practice Responsibilities Committee	CPA delegation to meet with OPR Director - hot topics discussion	Main IR	Karen Hawkins
8-May-14	1:00-2:00	ABA Tax Section	Handling Communication Breakdowns	Washington DC	Rob Malone
8-May-14	4:00 - 5:30	ABA Tax Section	Meet & Greet = Committee on Standards of Tax Practice	Main IR - OPR Conference Room	Karen Hawkins
9-May-14	8:00-9:30	ABA Tax Section	Committee on US Activities of Foreigners & Tax Treaties and	Washington DC	Karen Hawkins
9-May-14	11:00 - 11:55	ABA Tax Section	Government Panel = Ethical Issues in Federal Tax Practice	Washington DC	Karen Hawkins
9-May-14	11:55 - 12:50	ABA Tax Section	Standards Tax Committee = Serving Two Masters: The Practitioner's Duties Under Circular 230 and As an Advocate for A Client	Washington DC	Karen Hawkins
9-May-14	7:15 - 7:45	NAEA (National Assn. of Enrolled Agents)	May Board Mtg. - Keynote speaker	Crystal City, VA	Karen Hawkins
13-May-14	12:00-12:50	CSEA (California Society of Enrolled Agents Super Seminar	Overview of Circular 230 Updates (presentation and Q&A)	Las Vegas, NV	Karen Hawkins
22-May-14	TBD	Eastern PA Working Together Conference		Malvern, PA	Rob Malone
29-May-14	12:00 - 12:50	CSEA (California Society of Enrolled Agents Super Seminar	Overview of Circular 230 Updates (presentation and Q&A)	Reno, NV	Karen Hawkins
JUNE 2014					
9-Jun-14	3:15 - 4:30	AICPA Practitioners/TECH Conf.	Circular 230 & CPA Ethics Obligations	Las Vegas, NV	Karen Hawkins
11-Jun-14	11:35-12:25	Tax Alliance Conference 2014	OPR Presentation	Plano, TX	Karen Hawkins
12-Jun-14	2:00-3:30	SB/SE Collections		Office Communicator	Rob Malone
17-Jun-14	All Day	Tax Talk Today Broadcast	OPR Presentation	Washington, DC	Karen Hawkins
18-Jun-14	11:00 - 12:00	IRS SBSE Collection	OPR Q&A	(Internal) Conference Call	Karen Hawkins
19-Jun-14	10:00-11:00	Appeals		Telephone	Rob Malone
20-Jun-14	11:00-12:00	NY University Tax Controversy Forum	OPR Presentation	New York, NY	Karen Hawkins
20-Jun-14		TE/GE	Gulf Coast Council Mtg	Office Communicator	Rob Malone
24-Jun-14	1:00-3:00	29th Annual Spring Tax Day	CBIT	New York, NY	Karen Hawkins
25-Jun-14	2:00 - 4:00	SB/SE Circular 230 Webinar	(Rebroadcast) Circular 230 Update	Webinar w/Live Q&A	Karen Hawkins
End Month		Ethical Standards	Archived Stats	Video Portal	
3rd Qtr		Circular 230	Archived Stats	Video Portal	
3rd Qtr		A Message from OPR	Archived Stats	Video Portal	
3rd Qtr		An Overview of Circular 230 and the Office of Professional Responsibility for the Newly (or Aspiring) Registered/Enrolled Practitioner (2012 Tax Forum Seminar)	Archived Stats		
3rd Qtr		Key Circular 230 Provisions: What Every Tax Return Preparer Needs to Know (2012 Tax Forum Seminar)	Archived Stats		

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3rd Qtr		What Every Tax Return Preparer Needs to Know: Key Circular 230 Provisions (2013 Tax Forum Seminar)	Archived Stats		
3rd Qtr		An Overview of Circular 230 and the Office of Professional Responsibility (OPR) for New Tax Professionals (2013 Tax Forum Seminar)	Archived Stats		
JULY 2014					
1-Jul-14	10:10-11:00	TAX FORUM	An Overview of Tax Practice Ethical Rules & the Office of Professional Responsibility (OPR)	Chicago, IL	Karen Hawkins
1-Jul-14	2:45-3:35	TAX FORUM	Key Circular 230 Provisions - What Every Tax Professional Needs to Know OPR	Chicago, IL	Karen Hawkins
2-Jul-14	9:05-9:55	TAX FORUM	An Overview of Tax Practice Ethical Rules & the Office of Professional Responsibility (OPR)	Chicago, IL	Karen Hawkins
2-Jul-14	10:30-12:00	Appeals	Town Hall	Chicago, IL	Karen Hawkins
2-Jul-14	2:15-3:05	TAX FORUM	Key Circular 230 Provisions - What Every Tax Professional Needs to Know OPR	Chicago, IL	Karen Hawkins
2-Jul-14	3:20-4:10	TAX FORUM	Professional Tax Practice Responsibilities - Circular 230 - A Case Study (OPR PANEL)	Chicago, IL	Karen Hawkins
9-Jul-14	6:00-7:30	Georgetown University	Tax Lawyering and Professional Responsibility in Federal Tax Practice	Washington, DC	Karen Hawkins
15-Jul-14	10:10-11:00	TAX FORUM	An Overview of Tax Practice Ethical Rules & the Office of Professional Responsibility (OPR)	San Diego, CA	Karen Hawkins
15-Jul-14	2:45-3:35	TAX FORUM	Key Circular 230 Provisions - What Every Tax Professional Needs to Know OPR	San Diego, CA	Karen Hawkins
16-Jul-14	9:05-9:55	TAX FORUM	An Overview of Tax Practice Ethical Rules & the Office of Professional Responsibility (OPR)	San Diego, CA	Karen Hawkins
16-Jul-14	2:15-3:05	TAX FORUM	Key Circular 230 Provisions - What Every Tax Professional Needs to Know OPR	San Diego, CA	Karen Hawkins
16-Jul-14	3:20-4:10	TAX FORUM	Professional Tax Practice Responsibilities - Circular 230 - A Case Study (OPR PANEL)	San Diego, CA	Karen Hawkins
22-Jul-14	10:10-11:00	TAX FORUM	An Overview of Tax Practice Ethical Rules & the Office of Professional Responsibility (OPR)	New Orleans, LA	Karen Hawkins
22-Jul-14	2:45-3:35	TAX FORUM	Key Circular 230 Provisions - What Every Tax Professional Needs to Know OPR	New Orleans, LA	Karen Hawkins
23-Jul-14	9:05-9:55	TAX FORUM	An Overview of Tax Practice Ethical Rules & the Office of Professional Responsibility (OPR)	New Orleans, LA	Karen Hawkins

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23-Jul-14	2:15-3:05	TAX FORUM	Key Circular 230 Provisions - What Every Tax Professional Needs to Know OPR	New Orleans, LA	Karen Hawkins
23-Jul-14	3:20-4:10	TAX FORUM	Professional Tax Practice Responsibilities - Circular 230 - A Case Study (OPR PANEL)	New Orleans, LA	Karen Hawkins
30-Jul-14	10:00	SBSE Collections	Meeting	OCS	Karen Hawkins
31-Jul-14	9:05-9:50	NPL	Bi-Monthly Meeting	Washington, DC	Karen Hawkins
AUGUST 2014					
5-Aug-14	1:00-2:30	TEGE (Tax Exempt Bonds)	Circular 230 Training		Karen Hawkins
7-Aug-14	3:00-3:50	Latino Tax Professional Association	First Annual 2014 LTPA National Convention (Due Diligence)	Las Vegas, NV	Karen Hawkins
7-Aug-14	4:00-4:50	Latino Tax Professional Association	First Annual 2014 LTPA National Convention (Hot Topics/New Circular 230)	Las Vegas, NV	Karen Hawkins
11-Aug-14	9:00-10:00	Summer 2014 CDP Class		Washington, DC	Lee Martin
12-Aug-14	1:00-2:00	ABA Live Webinar		Webinar	Karen Hawkins
13-Aug-14	1:00-2:30	TEGE (Exempt Organizations)	Circular 230 Training		Karen Hawkins
19-Aug-14	10:10-11:00	TAX FORUM	An Overview of Tax Practice Ethical Rules & the Office of Professional Responsibility (OPR)	National Harbor/DC	Karen Hawkins
19-Aug-14	2:45-3:35	TAX FORUM	Key Circular 230 Provisions - What Every Tax Professional Needs to Know OPR	National Harbor/DC	Karen Hawkins
20-Aug-14	9:05-9:55	TAX FORUM	An Overview of Tax Practice Ethical Rules & the Office of Professional Responsibility (OPR)	National Harbor/DC	Karen Hawkins
20-Aug-14	2:15-3:05	TAX FORUM	Key Circular 230 Provisions - What Every Tax Professional Needs to Know OPR	National Harbor/DC	Karen Hawkins
20-Aug-14	3:20-4:10	TAX FORUM	Professional Tax Practice Responsibilities - Circular 230 - A Case Study (OPR PANEL)	National Harbor/DC	Karen Hawkins
21-Aug-14	1:00-2:30	TEGE (Employee Plans)	Circular 230 Training		Karen Hawkins
25-Aug-14	1:15-2:15	Carolinas Tax Professional Symposium		Charlotte, NC	Karen Hawkins
26-Aug-14	10:10-11:00	TAX FORUM	An Overview of Tax Practice Ethical Rules & the Office of Professional Responsibility (OPR)	Orlando, FL	Karen Hawkins
26-Aug-14	2:45-3:35	TAX FORUM	Key Circular 230 Provisions - What Every Tax Professional Needs to Know OPR	Orlando, FL	Karen Hawkins
27-Aug-14	9:05-9:55	TAX FORUM	An Overview of Tax Practice Ethical Rules & the Office of Professional Responsibility (OPR)	Orlando, FL	Karen Hawkins
27-Aug-14	2:15-3:05	TAX FORUM	Key Circular 230 Provisions - What Every Tax Professional Needs to Know OPR	Orlando, FL	Karen Hawkins
27-Aug-14	3:20-4:10	TAX FORUM	Professional Tax Practice Responsibilities - Circular 230 - A Case Study (OPR PANEL)	Orlando, FL	Karen Hawkins
SEPTEMBER 2014					

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3-Sep-14	2:00-3:15	IRS Criminal Investigation		Live Meeting	Karen Hawkins
8-Sep-14	12:30-2:00	TEGE (Federal, State & Local Governments / Indian Tribal Governments)	Circular 230 Training		Karen Hawkins
11-Sep-14	6:00-8:00	NJ State Bar Association	Tax Law Section	New Brunswick, NJ	Karen Hawkins
16-Sep-14	TBD	SBSE Exam	TCO Group	OCS	Lee Martin
17-Sep-14	1:00-2:45	AICPA	Webcast	Webcast	Karen Hawkins
17-Sep-14		NJSCPA			Stuart Murray
17-Sep-14	11:15-12:00	Office of Appeals	Team Meeting	OCS	Rob Malone
17-Sept-14	2:45-4:00	National Association of Bond Lawyers	Bond Attorney's Workshop	Chicago, IL	Lee Martin
18-Sept-14	11:00-12:15	National Association of Bond Lawyers	Bond Attorney's Workshop	Chicago, IL	Lee Martin
18-Sept-14	3:45-5:00	National Association of Bond Lawyers	Bond Attorney's Workshop	Chicago, IL	Lee Martin
19-Sept-14	10:30-11:45	National Association of Bond Lawyers	Bond Attorney's Workshop	Chicago, IL	Lee Martin
19-Sep-14	1:30	ABA	Government Updates Panel	Denver, CO	Karen Hawkins
20-Sep-14	10:30	ABA	Corporate Tax Committee	Denver, CO	Karen Hawkins
25-Sep-14		AICPA	Webcast (Rebroadcast)	Webcast	Karen Hawkins
30-Sep-14	10:00	Art Appraisers	Meeting	OCS	Karen Hawkins
End Month		Ethical Standards	Archived Stats	Video Portal	
4th Qtr		Circular 230	Archived Stats	Video Portal	
4th Qtr		A Message from OPR	Archived Stats	Video Portal	
OCTOBER 2014					
2-Oct-14	10:00-10:30	Hartford Territory Small Business Self Employed		Live Meeting	Rob Malone
9-Oct-14	8:30-10:30	Virginia Society of Enrolled Agents (VSEA)	OPR Ethics/Circular 230	via OCS	Karen Hawkins
17-Oct-14	3:45	ALI	CLE Conference	Washington, DC	Karen Hawkins
20-21-Oct-14	TBD	AHLA	Tax Conference	Washington, DC	Stuart Murray
20-21-Oct-14	TBD	AHLA	Tax Conference	Washington, DC	Stuart Murray
21-Oct-14	TBD	DC Metro and Southern CA Chapters of the Appraisal Institute	IRS Valuation Summit	Washington, DC	Stuart Murray
21-Oct-14	8:30-10:00	ILCPA (Illinois CPA) - IRS/Tax Practitioner Symposium	OPR Overview (Tax preparer oversight, Investigations & Disciplinary Actions & Referrals	Rosemont, IL	Karen Hawkins
23-Oct-14	TBD	NYU Graduate Tax Institute	Ethics Panel	New York, NY	Karen Hawkins
28-Oct-14	TBD	2014 UCLA Extension 30th Annual Tax Controversy Conference	OPR Ethics/Circular 230	Beverly Hills, CA	Karen Hawkins
28-Oct-14	9:00-10:00	SE Regional Bar Association	SE Regional Bar/IRS Liaison Meeting	Washington, DC	Rob Malone
29-Oct-14	2:00	Circular 230 Broadcast	External	Webinar	Karen Hawkins
30-Oct-14	12:00	Bar Association of San Francisco	Taxation Committee	San Francisco, CA	Karen Hawkins
30-Oct-14	5:30	Golden Gate University	LLM Class	San Francisco, CA	Karen Hawkins

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31-Oct-14		Oregon Tax Symposium	18th Annual IRS/Practitioners Forum	Portland, OR	Karen Hawkins
NOVEMBER 2014					
4-Nov-14	9:00-10:15	AICPA	National Tax Conference	Washington, DC	Lee Martin
5-Nov-14	8:00	SCORE Maine	Keynote Speaker	Augusta, ME	Karen Hawkins
5-Nov-14	10:00	SCORE Maine	Panel	Augusta, ME	Karen Hawkins
6-Nov-14	10:10-12:00	WA State Working Together Conference		Seattle, WA	Karen Hawkins
6-Nov-14	1:00	ABA	Trust Tax Committee	Washington, DC	Lee Martin
12-Nov-14	1:25-2:15	Greater Philadelphia Chapter of the PA Institute of CPAs	Greater Phila CPE	Springfield, PA	Robert Malone
12-Nov-14	2:30	Illinois CPA Society	Annual Tax Conference	Des Plaines, IL	Karen Hawkins
12-Nov-14	8:30-10:00	CDP Class		Washington, DC	Lee Martin
14-Nov-14	1:00-1:50	Golden Gate Society of EAs	Fall Seminar	Foster City, CA	Karen Hawkins
17-Nov-14	10:05	Estate Tax Attorneys		Telephone	Karen Hawkins
20-Nov-14	2:30 - 3:30	Alabama Federal Tax Clinic - The 68th Annual Federal Tax Clinic	Circular 230/OPR Overview	Tuscaloosa, AL	Karen Hawkins
DECEMBER 2014					
2-Dec-14	12:15-1:00	Minnesota Bar Association (Tax Section)	2014 Tax Law Institute	Minneapolis, MN	Karen Hawkins
2-Dec-14	1:15-2:00	Minnesota Bar Association (Tax Section)	2014 Tax Law Institute	Minneapolis, MN	Karen Hawkins
4-Dec-14	11:00	53rd Annual Arkansas Federal Tax		Little Rock, AR	Karen Hawkins
8-Dec-14	1:00-2:00	ABA		Washington, DC	Rob Malone
9-Dec-14	8-9:45	LITC Grantee Conference		Washington, DC	Karen Hawkins
10-Dec-14	1:00-2:35	ABA	Live CLE Webinar		Karen Hawkins
11-Dec-14	2:30	ABA 31st Annual Nat'l. Institute on Criminal Tax Fraud & 4th Annual Nat'l. Institute on Tax Controversy	Ethical Issues in Challenging Client Relationships	Las Vegas, NV	Karen Hawkins
22-Dec-14	11:00	CalCPA	Live Broadcast	San Mateo, CA	Karen Hawkins
Total					