



Nationwide Tax Forum

2026 Chicago

Please use the Schedule-at-a-Glance to help plan your day of seminars. The seminars are listed under the time they will be held at each location. Seminar room assignments will be available on-site in your registration packet.

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Tuesday

8:00 am – 8:50 am

- Schedule C Issues Facing the Tax Professional **28** **T**
- Beyond the Basics: Circular 230, Due Diligence, and Managing Professional Risk **4** **E**
- A Look Into the Independent Office of Appeals **1** **T**
- AI Deepfakes, Identity Theft & Tax Pro Security: Protecting Your Practice in the Next Era of Fraud **2** **T**
- Tax Issues Relating to NIL, Performers, and Influencers **30** **T**

9:05 am – 9:55 am

- Review the Qualified Business Income Deduction and 2026 Updates **27** **T**
- New Capabilities for Business Tax Pros, Refund Status Email and More for IRS Online Accounts* **18** **U** **3** **10**
- Tax-Exempt Organizations, Charities & Nonprofits Updates **33** **U** **1**
- Unlocking Savings: The Four Temporary Deductions You Can't Afford to Miss Under the Working Families Tax Cuts Act ("One Big Beautiful Bill") **38** **T** **3**
- Your License to Practice: Circular 230 and the Role of the Office of Professional Responsibility **40** **E**

10:10 am – 11:00 am

- Tax Professional's Guide to Preparing Tax Returns for Taxpayers with ITINs **32** **T**
- Penalties and Disaster Tax Relief **20** **U**
- Churches, Clergy and Donors: Common Tax Issues for Practitioners **5** **T**
- Unpacking the BBA: Compliance and Challenges **39** **U**

Lunch/NTF Expo

1:30 pm – 2:20 pm

- Plenary Session: IRS Compliance, Filing Season and Technology Updates: A Conversation with IRS Leadership **22** **U** **1**

2:45 pm – 3:35 pm

- Ethics in 2026 - Get it Right **9** **E** **3**
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- Navigating the IRS: Did You Know? **16** **T**
- Representation 101 **25** **T**

3:50 pm – 4:40 pm

- Stay Compliant. Stay Competitive. Stay Ahead. An Update from the Tax Professional Management Office **12** **T**
- Digital Asset Information Reporting – What Practitioners Need to Know **8** **T**
- Tick Tock, the Clock Is Running - Or Is It? Understanding the Statute of Limitations **36** **T**
- Navigating Wage Reporting with SSA: New Requirements, Tools and Best Practices for Submitters **17** **T**
- Recognizing Emerging Schemes: Real World Examples and Steps to Protect Your Firm **24** **T**

Wednesday

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- Operating a Retirement Plan for the Do-It-Yourself Small Business Owner **19** **T**
- Data Breaches: What Tax Professionals

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1:00 pm – 1:50 pm

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- Penalties and Disaster Tax Relief **20** **U**

- Review the Qualified Business Income Deduction and 2026 Updates **27** **T**

3:20 pm – 4:10 pm

- Resolving Disputes Effectively: The Power of ADR **26** **T**
- Ethics in 2026 - Get it Right **9** **E** **3**
- Managing IRS Collection Cases: Tools, Timing and Tactics **14** **T**
- Recent Updates in Retirement Plan Guidance – What You Need to Know **23** **U**

Thursday

8:00 am – 8:50 am

- Resolving Disputes Effectively: The Power of ADR **26** **T**

- Recognizing Emerging Schemes: Real World Examples and Steps to Protect Your Firm **24** **T**

- Section 530A Trump Accounts: Contributions by Parents and Guardians, Employer Contributions, Qualified General Contributions and Government Pilot Contributions **29** **U** **3**

- New Capabilities for Business Tax Pros, Refund Status Email and More for IRS Online Accounts* **18** **U** **10**

9:05 am – 9:55 am

- TIGTA: What Preparers Need to Know **37** **T** **1**
- Recent Updates in Retirement Plan Guidance – What You Need to Know **23** **U**
- Navigating IRS Audits: Processes, Documentation and Digital Tools for Tax Professionals **15** **T**

10:10 am – 11:00 am

- A Look Into the Independent Office of Appeals **1** **T**
- Tax Law Changes, Saver's Match and Other Key Updates for Tax Year 2026* **31** **U** **3** **10**
- Representation 101 **25** **T**
- The Details Matter When It Comes to Your Due Diligence **34** **T**

11:15 am – 12:05 pm

- Unlocking Savings: The Four Temporary Deductions You Can't Afford to Miss Under the Working Families Tax Cuts Act ("One Big Beautiful Bill") **38** **T** **3**
- Tax Issues Relating to NIL, Performers, and Influencers **30** **T**
- Stay Compliant. Stay Competitive.

- Stay Ahead. An Update from the Tax Professional Management Office **12** **T**

Lunch

1:30 pm – 2:20 pm

- Exiting a Corporation: Tax Fundamentals Every Practitioner Should Know **10** **T**
- Operating a Retirement Plan for the Do-It-Yourself Small Business Owner **19** **T**
- Data Breaches: What Tax Professionals Need to Do and When to Do It* **7** **T** **10**
- Schedule C Issues Facing the Tax Professional **28** **T**

2:35 pm – 3:25 pm

- Tick Tock, the Clock Is Running - Or Is It? Understanding the Statute of Limitations **36** **T**
- The Working Families Tax Cuts Act ("One Big Beautiful Bill") Deductions for Tips, Overtime, and Car Loan Interest: What's Reported Where? **35** **U** **3**
- Tax Professional's Guide to Preparing Tax Returns for Taxpayers with ITINs **32** **T**

3:40 pm – 4:30 pm

- Coloring Outside the Lines: Shaping the Future of Tax Administration **6** **T**
- How Much Do You Know About Refundable Credits? **11** **T**
- Navigating the IRS: Did You Know? **16** **T**
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Nationwide Tax Forum

2026 San Diego

Please use the Schedule-at-a-Glance to help plan your day of seminars. The seminars are listed under the time they will be held at each location. Seminar room assignments will be available on-site in your registration packet.

PLEASE NOTE: This document is for planning purposes only. Seating is available on a first-come, first-served basis only.

Tuesday

8:00 am – 8:50 am

- Schedule C Issues Facing the Tax Professional **28** **T**
- Beyond the Basics: Circular 230, Due Diligence, and Managing Professional Risk **4** **E**
- A Look Into the Independent Office of Appeals **1** **T**
- AI Deepfakes, Identity Theft & Tax Pro Security: Protecting Your Practice in the Next Era of Fraud **2** **T**
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- Review the Qualified Business Income Deduction and 2026 Updates **27** **T**
- New Capabilities for Business Tax Pros, Refund Status Email and More for IRS Online Accounts* **18** **U** **3** **10**
- Tax-Exempt Organizations, Charities & Nonprofits Updates **33** **U** **1**
- Unlocking Savings: The Four Temporary Deductions You Can't Afford to Miss Under the Working Families Tax Cuts Act ("One Big Beautiful Bill") **38** **T** **3**
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- Churches, Clergy and Donors: Common Tax Issues for Practitioners **5** **T**
- Unpacking the BBA: Compliance and Challenges **39** **U**

Lunch/NTF Expo

1:30 pm – 2:20 pm

- Plenary Session: IRS Compliance, Filing Season and Technology Updates: A Conversation with IRS Leadership **22** **U** **1**

2:45 pm – 3:35 pm

- Ethics in 2026 - Get it Right **9** **E** **3**
- Managing IRS Collection Cases: Tools, Timing and Tactics **14** **T**
- Exiting a Corporation: Tax Fundamentals Every Practitioner Should Know **10** **T**
- Navigating the IRS: Did You Know? **16** **T**
- Representation 101 **25** **T**

3:50 pm – 4:40 pm

- Stay Compliant. Stay Competitive. Stay Ahead. An Update from the Tax Professional Management Office **12** **T**
- Digital Asset Information Reporting – What Practitioners Need to Know **8** **T**
- Tick Tock, the Clock Is Running - Or Is It? Understanding the Statute of Limitations **36** **T**
- Navigating Wage Reporting with SSA: New Requirements, Tools and Best Practices for Submitters **17** **T**
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8:00 AM – 8:50 AM

- Operating a Retirement Plan for the Do-It-Yourself Small Business Owner **19** **T**
- Data Breaches: What Tax Professionals

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- Section 530A Trump Accounts: Contributions by Parents and Guardians, Employer Contributions, Qualified General Contributions and Government Pilot Contributions **29** **U** **3**
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- Plenary Session: Artificial Intelligence in Tax – Panel Discussion **21** **T** **1**

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