# March 25, 2021 Meeting

The next scheduled program for the Knoxville Estate Planning Council will be an on-line presentation on Thursday, March 25, 2021.

## How to Avoid and What to Do If Audited by the IRS

Michael Gregory

A brief background on the IRS organization as it relates to the IRS Estate and Gift Tax Program and issues are presented to provide the participant with insight into the various silos and different cultures associated with business appraisal issues at the IRS. The processes of both the national and local classification process in Estate and Gift tax is presented and issues related to an examination are explored to provide insight of what to do to avoid an audit and what to do if any conflict using neuroscience. The insights from neuroscience may be applicable to resolving any conflict and negotiating winning solutions by taking advantage of The Collaboration Effect®.

**Course objectives**: Participants will be able to describe how the IRS works and how to work with this IRS; communicate how classification works at the IRS on estate and gift tax audits, and how to avoid an audit; identify how to work with IRS personnel if audited; and leverage the secrets of de-escalation and negotiation.

**Michael Gregory** received his BS from Valparaiso University, a MS from the U of Wisconsin – Madison, an MBA from DePaul University, an Accredited Senior Appraiser (Business Valuation) with the American Society of Appraisers, a Certified Valuation Analyst with the National Association of Certified Valuation Analysts, a Qualified Mediator with the Minnesota Supreme Court, a board member of the Minnesota State Bar Association Alternative Dispute Resolution Section. Mike focuses on helping resolve conflict with the IRS, negotiating winning solutions, and helping organizations be more productive and grow faster. Prior to founding his consulting firm, Mike had 28 years of experience with the IRS in a variety of capacities from specialist to executive level. During his last 11 years with the IRS, Mike was an IRS territory manager with responsibilities for up to 23 states with an emphasis in business valuation and specialist issues nationally.

Zoom meeting information will be sent out about two days before the scheduled date via email. Please login and register online at kepctn.org by 12:00 PM, Tuesday, March 23, 2021. If you do not receive the zoom meeting information, contact Carol Bangash as soon as possible.



## Member Contact Information

KEPC's main form of communication is email. If any of your profile information changes, especially your email, please update the necessary information on the KEPC website (kepctn.org). Meeting announcements, membership renewals, and other information is delivered via email. Please do not uncheck the "Contact Preference" for email under "Contact Information" . This feature allows KEPC to send emails to members but will not display your email if that is your preference. Regular meeting announcements are sent out in January, March, May, September, and November. Membership renewals are sent out in August. If you stop receiving regular emails, please contact Carol Bangash.

Please RSVP no later than Tuesday, March 23, 2021. Guests are welcome to attend the meeting. To register for this course, go to kepctn.org, or call 865-474-7360.

Delivery Method: Group Live delivered online due to COVID-19

Program Level: Basic

Prerequisites: None

Advanced Preparation: None

CLE, CLU, CPE Credit: 1 hour Tax

Due to this program being presented free of charge, there will be no refunds issued for members. Guests must cancel 48 hours prior to meeting date for full refund. Participants will be notified of any meeting cancellations via email as soon as possible. For more information regarding refund, complaint and program cancellation policies, please contact Carol Bangash at 865-474-7360.

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