

## Registration Form 2026 IRS Nationwide Tax Forum

### Notes & Instructions:

- Please fax this form back to (202) 403-3871 or mail it back to:  
*IRS Nationwide Tax Forum  
 PO Box 591  
 Funkstown, MD 21734*
- **One attendee** per form.
- Please refer to the website ([www.irstaxforum.com](http://www.irstaxforum.com)) for important information, rules and regulations, including: pricing and deadlines, hotel information and the cancellation policy.
- **We strongly encourage you to register online to ensure prompt processing.** Registrations received by mail or by fax will be processed electronically including payments. Please print clearly to avoid mistakes.
- **Privacy Act notification:** We request your personal information during registration under the authority of 5 USC 301 and 26 USC 7801. We use this information to establish a record of participants in the Nationwide Tax Forum programs. We also use the information to contact you regarding other IRS initiatives, to provide information you may be interested in, and to ask questions that help us evaluate our programs. Providing this information is voluntary. By furnishing the requested information, you are deemed to have consented to use of your data. We will use the information you provide only for the reasons you provided it. This information may be disclosed to contractors to perform the contract; to the Department of Justice for use in civil or criminal litigation; to licensing organizations for use in administering their professional licensing and continuing education programs. Your information will not be sold or released to companies or individuals for the purpose of marketing or soliciting. However, when you allow a vendor to scan your badge you are giving them permission to collect your personal information and use it as they wish.
- By signing below, I also recognize that the contractor will not be allowed to re-disclose information you provide except when necessary to perform the contract for the IRS Nationwide Tax Forum.

|            |       |
|------------|-------|
| Signature: | Date: |
|------------|-------|

### STEP I: Select Your Forum(s) (please check all that apply)

|  | City            | Dates   | Early Bird Registration<br>Deadline (\$275/person)* | Standard Registration<br>Deadline (\$329/person)* |
|--|-----------------|---|---|---|
|  | Chicago, IL     | July 7 <sup>th</sup> – 9 <sup>th</sup>        | June 15 <sup>th</sup> (5pm ET)                      | June 23 <sup>rd</sup> (5pm ET)                    |
|  | New Orleans, LA | August 4 <sup>th</sup> – 6 <sup>th</sup>      | June 15 <sup>th</sup> (5pm ET)                      | July 21 <sup>st</sup> (5pm ET)                    |
|  | New York, NY    | August 18 <sup>th</sup> – 20 <sup>th</sup>    | June 15 <sup>th</sup> (5pm ET)                      | August 4 <sup>th</sup> (5pm ET)                   |
|  | Orlando, FL     | September 1 <sup>st</sup> – 3 <sup>rd</sup>   | June 15 <sup>th</sup> (5pm ET)                      | August 18 <sup>th</sup> (5pm ET)                  |
|  | San Diego, CA   | September 15 <sup>th</sup> – 17 <sup>th</sup> | June 15 <sup>th</sup> (5pm ET)                      | September 1 <sup>st</sup> (5pm ET)                |

\*Registration and payment **must be completed before the early/standard registration date at 5:00 PM ET.** In order to receive the rates listed in the table above, mailed registrations **must be postmarked by** and faxed registrations must be **received by** 5:00 PM ET on the corresponding deadline. **Registrations received after the standard registration deadline are subject to the rate of \$409/person.** Email confirmation will be sent when your registration has been processed. Contact us if you do not receive a confirmation email within 10 days.

### STEP II: Contact Information (please print or type)

|   |             |                               |
|---|-------------|-------------------------------|
| Prefix:   | First Name: | Last Name:                    |
| Name as it should appear on badge:                      |             | Company/Organization & Title: |
| Address:  |             |                               |
| City:   |             | State:                        |
| Telephone Number:                                       |             | Fax Number:                   |
| Emergency Contact Name:                                 |             | Emergency Contact Number:     |
| CTEC Number (optional):                                 |             |                               |
| Do you have a PTIN? If so, please provide PTIN Number*: |             |                               |
| PTIN Last Name*:  |             |                               |

**Important note about PTIN and PTIN Last Name:** For CE credits to be reported to the IRS PTIN office, the PTIN Last Name field must match **EXACTLY** how your last name is written on your online PTIN account. Please do not include your first or middle name(s) in the PTIN Last Name field. Please confirm you are entering the correct 9 digit PTIN.

### STEP III: Workshop Information

If you wish to participate in either of the two-hour workshops, please indicate below which day/time you wish to attend. Please realize that space is limited and will be assigned on a first-come, first-served basis for both workshops. If we are able to accommodate your request, your workshop(s) will be reflected in your online registration account on [www.irstaxforum.com](http://www.irstaxforum.com) (if you register early). Requesting a workshop time slot on this form is NOT a guarantee.

#### Tax-Exempt Organizations, Charities & Nonprofits Compliance Basics, Resources, and Recent Updates

- Tuesday, 2:45PM–4:40PM       Wednesday, 9:05AM–11:00AM

#### Charities & Nonprofits – Unrelated Business Income

- Wednesday, 2:15PM-4:10PM

### STEP IV: Professional Profile

What is the primary reason(s) you attend the IRS Nationwide Tax Forum? (Check all that apply)

- Earn CE Credits  
 Hear directly from the IRS  
 Quality of information  
 Network with fellow tax professionals  
 Visit exhibitors  
 Case Resolution Program

My principal credential or qualification is: (Check all that apply)

- Attorney  
 Certified Public Accountant (CPA)  
 Enrolled Agent (EA)  
 Annual Filing Season Program Participant (AFSP)  
 Tax Preparer (unenrolled)  
 Certifying Acceptance Agent (CAA)  
 Enrolled Actuary  
 Enrolled Retirement Plan Agent (ERPA)  
 None of the above

My clients are primarily:

- Individuals filing Form 1040, usually no business component (Schedule C, E, or F)  
 Individuals filing Form 1040, with a business component (Schedule C, E, or F)  
 Small businesses (LLCs with more than one owner, corporations, partnerships)  
 Large businesses (gross receipts over \$1 million)  
 Exempt organizations

How many years have you worked in the tax professional industry?

- 1 - 5  
 6 - 10  
 11 - 20  
 20+

What is the approximate number of tax returns you prepare each year?

- Fewer than 50  
 50 - 150  
 151 - 500  
 501 - 1,000  
 1,001 - 2,000  
 2,001 or more

Which of the following special events are you planning to attend at the Tax Forum?

*Please note: these events do **NOT** qualify for CE credit. Making a selection is for internal planning purposes only and does **NOT** constitute signing up for the event.*

- Practice Management Session (Monday evening)  
 CERCA Lunch and Learn (Wednesday, lunchtime)  
 Taxpayer Advocate Town Hall (Wednesday evening)  
 Case Resolution Room (See schedule for days and times)  
 Digital Account Services Room (See schedule for days and times)  
 I wasn't aware of these special events

|   |   |
|---|---|
| Which social media sites/platforms do you use? (Check all that apply) | <input type="checkbox"/> Facebook<br><input type="checkbox"/> X (formerly known as Twitter)<br><input type="checkbox"/> LinkedIn<br><input type="checkbox"/> Instagram<br><input type="checkbox"/> YouTube<br><input type="checkbox"/> None<br><input type="checkbox"/> Other (please specify: _____) |
|---|---|

|                   |  |
|-------------------|--|
| What is your age? | <input type="checkbox"/> 25 or younger<br><input type="checkbox"/> 26 - 35<br><input type="checkbox"/> 36 - 45<br><input type="checkbox"/> 46 - 55<br><input type="checkbox"/> 56 - 65<br><input type="checkbox"/> 65+<br><input type="checkbox"/> I do not wish to answer |
|-------------------|--|

|  |   |
|--|---|
| <p>In order to measure and improve our customer satisfaction and help evaluate the IRS Nationwide Tax Forum program, we request, under authority 5 U.S.C. 301, your voluntary participation in a customer satisfaction survey. Providing this information is voluntary. If you agree, please select I agree. The contractor shall provide only aggregate results to the Office of Communications &amp; Liaison, Internal Revenue Service, to ensure anonymity is maintained. By selecting I agree, I authorize the release of my contact information to a contractor so that I may be contacted for my insight and/or recommendations for improvement of the IRS Nationwide Tax Forum. The contractor will not be allowed to redisclose information I provide except when necessary to perform the contract for the IRS.</p> | <input type="checkbox"/> I agree to participate in a customer satisfaction survey<br><br><input type="checkbox"/> I do not agree to participate in a customer satisfaction survey |
|--|---|

**PLEASE READ: Scanning Agreement**

In order to receive CPE credit for a Seminar or Workshop class you must scan your badge when entering the room.  
**You must initial here to acknowledge the Scanning Agreement**

**STEP V: Payment Information**

- Early Bird registration price is **\$275** per person (**\$265** if you are a member of a partner association). Standard registration price is **\$329**. After the standard registration deadlines, the price increases to **\$409** per person.
  - Please note that cash is not accepted and that the registration fee is non-refundable and non-transferable. Checks should be made payable to IRS Nationwide Tax Forum and mailed to: IRS Nationwide Tax Forum, PO Box 591, Funkstown, MD 21734.
  - **Registration fees are non-refundable and non-transferable to another year.** There is a \$25 charge for transferring a registration to a different forum. There is a \$75 fee applied to all returned checks and credit card chargebacks.
- I Acknowledge the Payment/Cancellation Policy\* (please check that you acknowledge this policy)**

**Partner Association** (if applicable: check one AND provide the correct discount code AND membership ID number)  
**\*\*Please note that the \$10 Partner Association discount is ONLY available to the Early Registration rates\*\***

ABA   
 AICPA   
 NAEA   
 NATP   
 NSA   
 NSTP   
 VITA   
 LITC

|                            |                       |
|----------------------------|-----------------------|
| Association Discount Code: | Membership ID Number: |
|----------------------------|-----------------------|

**Check: Please select this box if you are paying by check and attach the check to your registration form**

|   |                               |                                     |                  |
|---|-------------------------------|-------------------------------------|------------------|
| If paying by credit card, please select from: |                               |                                     |                  |
| <input type="checkbox"/> American Express     | <input type="checkbox"/> Visa | <input type="checkbox"/> MasterCard |                  |
| Credit Card Number:                           | Expiration Date:              | Security Code:                      | Approved Amount: |

If your billing address for the credit card provided is different from that provided above, please fill out below:

Billing Address:

|            |                             |
|------------|-----------------------------|
| Signature: | Name as it appears on card: |
|------------|-----------------------------|

If under the Americans with Disabilities Act (ADA), you require auxiliary aids, or services, please specify your needs: