

JO-ANN WEINER

SPEAKING/TEACHING ENGAGEMENTS

Date	Group	Topic
January, 2013	New Jersey Society of Enrolled Agents	Self-Rentals
November, 2014	Lorman Seminars	1099-MISC
January, 2015	J. L. Weiner & Associates, LLC	Divorce and Taxes
October, 2015	New Jersey Society of Enrolled Agents	Indirect Methods of Proving Income
December, 2015	Seton Hall University IRS Working Together	Indirect Methods of Proving Income
December, 2015	New York State Society of Enrolled Agents	Indirect Methods of Proving Income
March, 2016	Ethics Training and Consulting, LLC	Overview Taxation
March, 2016	Private Investigators	Overview Income Analysis
May, 2016	New Jersey Society of Enrolled Agents	Form 1099-MISC
June, 2016	Rowan University – IRS Working Together	Indirect Methods of Proving Income

December, 2016 Management in a Global Society Class
Rowan College at Burlington County

Forensic Tax Accounting Overview

In 2011, I taught IRS Revenue Agents IRC 351 Transfers, Domestic Production Activities Deduction, Accumulated Earnings Tax, Noncash Distributions, Taxation of Corporations, and a Balance Sheet Audit case study. While these courses were taught prior to the three-year time period, they were included to demonstrate, in part, the technical scope of my teaching experience.

I have written a two-hour presentation regarding Indirect Methods of Proving Income. The presentation includes handouts, a case study and power point. The methods included in the presentation are bank deposit analysis, cash transaction analysis, source and application of funds and a discussion of net worth, ratio analysis, and specific item methods. I would like to present this course at NTPI.

Also, available is a case study regarding Real Estate Professionals which includes an aspect of privacy act and third party contact violations. This course can be presented at NTPI.