



# 2020 STATE TAX SYMPOSIUM

Virtual Program presented by

**Maine Revenue Services**

**Thursday, September 24, 2020**

**8:00 am - 4:30 pm**

## Overview

Maine Revenue Services (MRS) is proud to present the 2020 State Tax Symposium. This one-day event will cover recent Maine tax updates and current agency highlights.

## Register here:

<https://www.eventbrite.com/e/state-tax-symposium-tickets-114986551872>

## Who Should Attend?

Taxpayers, Tax Professionals, Accountants, Enrolled Agents, CPAs, Tax Attorneys, Financial Planners and others who need to keep informed of changing and existing state tax laws.

## Professional Education Credits

**9.6 hours of CPE credits**

**8 hours of CLE credits**

**\$25 nonrefundable fee for each registrant.**

# Morning Session

8:00

## **Welcome**

**Michael Fortin**, Director, Maine Compliance Division

8:00-9:00

## **State Tax Administration and Revenue System (STARS): Impact on Taxpayers and Practitioners**

**Danny Reeves**, Project Manager

9:00-9:45

## **Property Tax Updates**

**Peter Lacy**, Director, Maine Property Tax Division

9:45-11:00

## **Sales Tax Basics**

**Alaina Patterson**, Tax Division Assistant Executive, Maine Sales/Use/Special Business Tax Division

**Judy Method**, Director, Maine Sales/Use/Special Business Tax Division

11:00-11:30

## **Medical Marijuana: 280E Income Tax Deduction**

**Jeff Bragdon**, Tax Section Manager, Maine Income/Estate Tax Division

11:30-12:00

## **Lunch Break**

# Afternoon Session

12:00-12:30

## **MRS's Modernized Website: An Overview**

**Laurie Brann**, Deputy Director, Maine Sales/Use/Special Business Tax Division

12:30-1:15

## **MRS Legal Overview**

**Alex Weber**, General Counsel, Office of General Counsel

1:15-1:45

## **Tax Audit Overview**

**John Lewandowski**, Deputy Director, Maine Income/Estate Tax Division

**Judy Methot**, Director, Maine Sales/Use/Special Business Tax Division

1:45-2:00

## **Return Processing**

**Matthew Pettengill**, Deputy Director, Maine Division of Revenue Services

2:00-3:15

## **Individual/Corporate Income Tax and Estate Tax Updates**

**John Lewandowski**, Deputy Director, Maine Income/Estate Tax Division

**Daniel D'Alessandro**, Attorney, Office of Tax Policy

**Heather Popadak**, Director, Maine Income/Estate Tax Division

3:15-3:45

## **Withholding and W2s**

**Tim Applegate**, Tax Section Manager, Maine Income/Estate Tax Division

3:45-4:15

## **Educational Opportunity Tax Credit (EOTC)**

**Bryan Lumbra**, Tax Section Manager, Maine Income/Estate Tax Division

4:15-4:30

## **Payment Plans**

**Kari Williams**, Deputy Director, Maine Compliance Division

4:30

## **Conclusion**

**Michael Fortin**, Director, Maine Compliance Division

# MRS Contact Information

<u>Department</u>	<u>Telephone Numbers</u>	<u>E-mail Addresses</u>	<u>Phone Hours</u>
Taxpayer Contact Center	(207) 624-9784	taxpayerassist@maine.gov	9am-Noon
Central Registration	(207) 624-5644	taxregistration@maine.gov	9am-Noon
Collections & Compliance	(207) 624-9595	compliance.tax@maine.gov	8am-5pm
Corporate Tax	(207) 624-9670	corporate.tax@maine.gov	9am-Noon
E-file Help Desk (1040 ONLY)	(207) 624-9730	efile.helpdesk@maine.gov	9am-Noon
Electronic Funds Transfer	(207) 624-5625	efunds.transfer@maine.gov	9am-Noon
Estate & Fiduciary Tax	(207) 626-8480	estatetax@maine.gov	9am-Noon
Fuel & Special Taxes	(207) 624-9609	fuel.tax@maine.gov	9am-Noon
Forms Request Line	(207) 624-7894	income.tax@maine.gov	9am-Noon
Individual Income Tax Assistance	(207) 626-8475		9am-Noon
Insurance Premium Tax	(207) 624-9753		9am-Noon
NexTalk (TTY Service)	(888) 577-6690		9am-Noon
Payment Plan/Income Tax	(207) 621-4300	compliance.tax@maine.gov	8am-5pm
Payment Plan/Other	(207) 624-9595	compliance.tax@maine.gov	8am-5pm
Practitioners' Hotline	(207) 626-8458		9am-Noon
Property Tax	(207) 624-5600	prop.tax@maine.gov	9am-Noon
Public Communications	(207) 626-8478		9am-Noon
Report a Breach or ID Theft	(207) 624-7658		9am-Noon
Sales Tax	(207) 624-9693	sales.tax@maine.gov	9am-Noon
Tax Clearance Letters	(207) 624-9595		8am-5pm
Office of Tax Policy	(207) 624-9677		9am-Noon
Taxpayer Advocate	(207) 624-9649	taxpayer.advocate@maine.gov	
Withholding Tax	(207) 626-8475	withholding.tax@maine.gov	9am-Noon
Tax Violations Hot Line	(207) 624-9600		8am-5pm