**Information provided for the Rocky Mountain EPC**

**May 12, 2021 12:00 PM Mountain Time**

**by Michael A. Gregory**

**How to Avoid and What to do if Audited by the IRS**

**Qualifications:** 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.

**Outline of Presentation**

* Some comments on neuroscience
* Two examples to set the tone
* Information on the IRS with an emphasis on exam estate and gift tax programs
* Information on the IRS with some basic information on Appeals and Litigation
* Tips to help resolve any conflict and negotiate winning solutions with the IRS or others

**Learning 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.

**Summary of the Program**

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®.

**Bio**

It is our pleasure to introduce Michael Gregory, ASA, CVA, NSA, MBA, and Qualified Mediator with the Minnesota Supreme Court, who founded Michael Gregory Consulting LLC in September 2011. Mike focuses on helping resolve conflict with the IRS, negotiating winning solutions, and helping organizations be more productive and grow faster taking advantage of The Collaboration Effect®. 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. Mike has been working with neuroscientists for over eight years and he has written [12 books](https://www.amazon.com/Michael-A.-Gregory/e/B08CNN3286?ref_=dbs_p_pbk_r00_abau_000000) focusing on [IRS issues business valuation](https://www.amazon.com/Business-Valuations-IRS-Michael-Gregory/dp/1945148020/ref%3Dsr_1_1?ie=UTF8&qid=1539924381&sr=8-1&keywords=Business%20Valuation%20and%20the%20IRS)*,* [conflict resolution](https://www.amazon.com/Peaceful-Resolutions-Illustrated-Conflict-Resolution-ebook/dp/B01N5D065X/ref%3Dsr_1_1?ie=UTF8&qid=1539924496&sr=8-1&keywords=peaceful%20resolutions), [servant leadership](https://www.amazon.com/Servant-Manager-Michael-Gregory/dp/0986030740/ref%3Dsr_1_1?ie=UTF8&qid=1539924580&sr=8-1&keywords=the%20servant%20manager), and his most recent book [The Collaboration Effect](https://www.amazon.com/dp/B08LHFX9RY/ref%3Drdr_kindle_ext_tmb). Mike has a BS from Valparaiso University, a MS from the University of Wisconsin – Madison and an MBA from DePaul University. Mike can be reached at mg@mikegreg.com and with his direct line at 651-633-5311.

**Photo**

