

AGENDA

AB 2962 INTERESTED PARTY MEETING

December 11, 2006

Monday, 1:00 pm- 3:00 pm

Franchise Tax Board, Town Hall, Gray Whale Room

Facilitators: Christie Trykar, Judi Bentzien

Attendees: Representatives from the California Land Title Association, California Association of Realtors and California Escrow Association; Tax Advisory Board Representatives; FTB Representatives; Interested Parties

Meeting Preparation: Review Pre-meeting Materials: Revenue & Taxation Code Sections 18662 and 18668, FTB Real Estate Withholding Survey, forms FTB 593 Booklet & 593B

Meeting Objectives: To present our plans to implement AB 2962 and solicit ideas to enhance our future plans related to AB 2962 administration and nonwage withholding in general.

Agenda Topics

	Topic	Person	Length
1.	Welcome and Kick-off Session	Anne Miller	1:00-1:15
2.	Introductions & Overview of Today's Meeting	Frank Lanza	1:15-1:25
3.	Overview of AB 2962 <ul style="list-style-type: none">• Brief History of Real Estate Withholding• Implementation Strategy• Preview 2007 Real Estate Withholding Forms• Demonstrate Online Calculator	Phillip Gray & Linda Castles	1:25-2:00
4.	Discuss AB 2962 Implementation Strategy After January 1, 2007	Group	2:00-2:30
5.	Future Plans/Administration for the Nonwage Withholding <ul style="list-style-type: none">• Survey Results• Revised Forms• System Enhancements• Other Suggestions	Christie Trykar & Phillip Gray	2:30-2:55
6.	Wrap Up <ul style="list-style-type: none">• Sharing of Today's Results• Opportunity for Future Discussion Topics• Evaluation	Phillip Gray & Christie Trykar	2:55-3:00