

AGENDA

JOINT SYMPOSIUM ON REDUCING TAXPAYER BURDEN

November 1, 2006

Wednesday, 8:00 am-Noon

Franchise Tax Board, Executive Conference Room (3rd Floor)

Facilitators:	Russ Reece, Judi Bentzien, Christie Trykar
Attendees:	Software Developers; Tax Practitioners, Tax Advisory Board Representatives; Franchise Tax Board and Departmental Representatives; Interested Parties
Meeting Preparation:	Review Pre-meeting Materials: Profiles of Low and Middle Income Taxpayers, FTB Board Transcript, Definition of Burden
Meeting Objectives:	<ul style="list-style-type: none">• Develop Alternatives to Reduce Burden of Filing Income Tax Returns<ul style="list-style-type: none">➤ Target Population: Low and Middle Income Taxpayers

Agenda Topics

	Topic	Person	Length
1	Kick-off Joint Session (Cover the following) <ul style="list-style-type: none">• California's diverse demographics and changing taxpayer needs.• Help us make the tax system more transparent to the public and easier to understand/use.• Focus on making more of our information and processes available and understandable to all taxpayers.• Enduring partnership with tax preparation industry to make it all happen.	Selvi Stanislaus	8:15-8:30
2	Introductions	Anne Miller	8:30-8:45
3	Overview of Joint Session <ul style="list-style-type: none">• Review Board's Direction of September 20, 2006• Review Target Population and Definition of Burden• Define Objectives	Anne Miller	8:45-8:55
4	Generate Alternatives to Reduce Burden <ul style="list-style-type: none">• Review Methodology for Achieving Today's Objectives• Brainstorm Options• Group Similar Options	Judi Bentzien	8:55-10:00
----- BREAK (10-10:15) -----			
	<ul style="list-style-type: none">• Prioritize Options• Develop Pros and Cons		10:15-11:00
5	Next Steps <ul style="list-style-type: none">• Determine Action Required for Each Alternative• Confirm Responsibility for Required Actions	Judi Bentzien	11:00-11:45
6	Wrap Up <ul style="list-style-type: none">• Share Results of Today's Efforts via Email• Opportunity for Additional Input (December Board Mtg)	Anne Miller	11:45-NOON