

irs-tax-forum-nola-2026 lookbook

RIG Intelligence — Field Lookbook

01 · The Event & The Play

The IRS Nationwide Tax Forum is where the mass of the profession actually gathers: **40+ seminars, up to 18 CE credits, a 2-day expo hall**, and an audience that is ~41% Annual Filing Season participants, 26% Enrolled Agents, 15% CPAs, 9% attorneys. New Orleans is the first fall stop (Aug 4–6, Hyatt Regency) — the profession shows up five months before busy season, which is exactly when an AI decision has to happen.

The play: this year's agenda is a gift — AI shows up as both threat ("AI Deepfakes, Identity Theft & Tax Pro Security") and tool (Digital IRS, AI in collection), inside a profession where **a written information security plan and Circular 230 due diligence are already legal duties**. AI adoption here is literally gated by documented governance. That is RIG's product.

02 · Who's in the Room

Category	Companies
Prep & practice suites	Drake Software, Wolters Kluwer, Thomson Reuters, Intuit Accountants, TaxSlayer Pro, TaxAct, OLTPro, CrossLink, Taxware Systems, ATAX
Resolution & practice ops	PITBULLTAX, Protection Plus, TaxDome, Financial Cents, Smartwiz, Verito, TaxOffice AI Services, SignalsHQ
Bank products & services	Republic Bank, Refundo, Refund Advantage, SBTPG, EPS Financial, Paychex, Canon USA, Topaz Systems, ID.me
Associations & schools	NAEA, NATP, NSA, NSTP, CSEA, Latino Tax Professionals, University of Illinois Tax School, TheTaxBook, Tax990, Zenwork

Per-seminar speaker names are not published; sessions are delivered by IRS division experts and association presenters. Leadership context: the IRS has no Senate-confirmed commissioner — **CEO Frank J. Bisignano runs day-to-day operations**.

03 · People Worth Your Time

- **Practice-owning EAs and CPAs at the security seminars** — the people taking notes on required safeguards are writing their AI governance requirements in real time. Sit next to them.
- **TaxOffice AI Services & SignalsHQ booths** — the "AI employees for firms" vendor wave; channel, competitor, or integration surface — find out which.
- **Drake / Wolters Kluwer / Thomson Reuters product staff** — the suites that will own the AI workflow by default; the white-label conversation.
- **NATP / NAEA education leads** — associations need CE content; a governed-AI workshop is a stage, not a sale.

- **Taxpayer Advocate Service (TAS) booth** — the "Purple Book" people; they hear where systems break first.

04 · Must-Attend Seminars

- **#13 Keynote Address** — Digital IRS, "zero paper," OBBBA provisions for the 2027 filing season, and the IRS's own "advanced technologies" for collection. The room's center of gravity.
- **#2 AI Deepfakes, Identity Theft & Tax Pro Security** — required safeguards, WISP, AI-driven defense. Your opening line for the week.
- **#4 Beyond the Basics: Circular 230, Due Diligence, and Managing Professional Risk** — includes evaluating risk "when AI tools or third-party data sources are involved." The compliance hook, verbatim.
- **#3 Qualified Tip & Qualified Overtime Deductions (NATP)** — the new OBBBA deductions every client will ask about.
- **#7 Data Breaches: What Tax Professionals Need to Do** (100-min) and **#9 Ethics in 2026 (AICPA)**.

05 · The RIG Angle (30 seconds per persona)

- **For the firm owner:** "Busy season is five months out. If you start governing AI in January, you're doing it during busy season — which means you're not doing it. One workflow — workpaper prep, research triage — with review rules and an audit trail, live before December."
- **For the software suite:** "Your users are about to demand AI with a compliance story. We are the governed layer — human review steps, provenance, audit trail — that makes your AI the defensible answer. White-label."
- **For the security-conscious practitioner:** "You already carry a WISP and Circular 230 duties. We make your AI use pass the same test your paper files do — every output reviewed, every source logged."

06 · Discovery Questions & Objection Handlers

1. What did your team actually use AI for last filing season — and who reviewed the output?
2. If the IRS asked how a position was researched, could you show the trail?
3. What's your written rule for when AI is allowed to touch client data?
4. Which eats more hours in February — research, workpapers, or review?
5. Who in your firm would sign off on an AI-drafted workpaper today?

"AI isn't allowed in our profession yet." — Your regulator runs AI itself (fraud detection, collection). The question isn't allowed-or-not; it's governed-or-not. **"We have a copilot license."** — A copilot drafts; it doesn't sign. The evidence standard didn't move an inch — who reviews it, and where's that written down? **"We'll deal with it after busy season."** — After busy season is next year's risk. The window is August through November; it closes fast.

07 · The Strike Plan

- **Mon Aug 3 (travel):** Expo hall map — mark the AI-labeled booths and the three suites. Read the OBBBA track list.
- **Tue Aug 4 (Day 1):** Keynote. Security seminar #2 — the note-takers beside you are your leads. Evening: association receptions (NATP/NAEA).

- **Wed Aug 5 (Day 2):** Circular 230 session #4 + data-breach #7. Three discovery conversations with 5-50 person firm owners. Two suite-vendor conversations.
- **Thu Aug 6 (Day 3):** Expo second pass — TaxOffice AI, SignalsHQ demos. Same-night follow-ups referencing the exact seminar each contact attended. Target: four fit calls booked before the plane home.