

TAX PLANNING

Field of Study: Taxes

CPE Credits: 8

Program Level: Intermediate

Prerequisites: 4-5 years experience or understanding of ordinary versus capital income, loss limitations, and characteristics of C Corporation versus S Corporation versus Partnerships

Advanced Preparation: None

Delivery Method: Group

Description

This course focuses on tax strategies and legal “loopholes” that can reduce client tax liabilities. It covers a variety of strategies before providing examples. Participants will review mock tax returns and apply the strategies just learned to the returns in order to save clients' tax dollars.

Learning Objectives

By the end of the session, participants will be able to:

- List four charitable gifting strategies (CRUT, CLAT, DAF, and QCD),
- Describe ideal client for NUA treatment,
- Calculate Roth conversion ladders using fill the bucket approach,
- Describe difference between Section 1202, 1244, and 1045 stock,
- Describe Benefits of Section 266,
- Determine who benefits from Section 1237,
- Articulate benefits of HSA, and
- List material participation requirements.

Who Should Attend?

This course is for tax preparers who need a foundation in tax planning. It focuses not just on teaching strategies but how to identify which clients are a good fit for various strategies.

Ready to Enroll?

To register for this session, email alyssa@shepherdpeaktaxsolutions.com with the name of the course. In order to be awarded the full credit hours, you must be present, registering your attendance and departure on the attendance sheets at the registration desk.

Refund and Cancellation Policy:

Should an unforeseen issue arise that inhibits the training from taking place as planned in the "Course and Dates" section above, the client (i.e., the business entity signing this agreement) has the right to cancel the training by contacting Alyssa M. Reed at alyssa@shepherdpeaktaxsolutions.com or 865-934-8581. However, in order to cancel and receive a partial refund, the client must 1) provide written cancellation to Instructor, 2) deliver such written cancellation at least 60 days before the training is scheduled to begin (according to dates listed in "Course and Dates" section), and 3) will be subject to a \$1,000 cancellation fee. All other course fees already paid will be refunded. If the client wishes to cancel but does not provide at least 60 days' notice, the client must still deliver written cancellation but will be charged a cancellation fee of 50% of the total training cost. All other course fees will be refunded to the Client who signed the contract and from whom Provider received previous payment. Should the Instructor initiate the cancellation, they will do so in writing to Client and a full refund will be provided to the Client who signed the contract and from whom Provider received previous payment. Further, Provider will communicate this cancellation via email to registered participants no later than 24 hours prior to the originally scheduled program. As Provider's transactions are directly with business entities and do not receive payment for courses or services from individuals (including individual CPAs), the refund for any cancellation (client or instructor initiated) will be paid to the business Client with whom Provider signed contract and from whom Provider received previous payment.

Complaint Resolution:

It is our expectation and goal to have every client satisfied. However, in the event a client is dissatisfied, please contact Alyssa M. Reed, CPA, CFP(R) P: 865-934-8581 E: alyssa@shepherdpeaktaxsolutions.com for complaint resolution. Every effort will be taken to have a mutually agreeable resolution. Some options may include partial refunds, additional training, or future discounts. In the event an individual participant has complaints, the program materials will include the following information for complaint resolution: Alyssa M. Reed, CPA, CFP(R) P: 865-934-8581 E: alyssa@shepherdpeaktaxsolutions.com.

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