BEST OF TAX PLANNING AND RETIREMENT IDEAS FOR INDIVIDUALS

Product Description

Give the very best tax advice to your individual and small business clients with this newly updated planning guide! This course is designed to guide you through dozens of old and new planning concepts and equip you with tools to help clients through unusual income years, long-term guidance for small businesses and high or low-income individuals. This rare instruction allows optimal tax and retirement planning rather than mere tax compliance. Whether you are a seasoned accountant looking for professional development or new to the tax preparation business, the instructors meet you where you are to fully benefit your clients, as well as yourself. Included are key updates from 2022 and 2023 Congressional and IRS changes, too! Overall, this course comprises three sub-topics: planning ideas for the W-2 taxpayer, planning for the small business owner, and planning for everyone. Each unit includes 15-30 planning tools, checklists, and example guidance illustrating the rules and tools needed to utilize the idea presented.

Prerequisites

None

Field of Study

Taxes - 8 Hours

Course Level

Intermediate

Course Objectives

What a thorough course. Designed to review old rules and explain new rules, this course covers the gamut of current and future tax planning moves for W-2 employees and retirees; estate and gift planning and business owners; good years, bad years and future years; taxpayers and heirs. Complete with pages of checklists, over 50 immediately useful ideas and deductions, this course is guaranteed to provide you with ideas, clearly defined compliance guidelines, written clear examples, and practitioner-oriented implementation steps.

Available Options

Webinar

A scheduled, online course viewable on any computer or device with Zoom access; suitable for single person use. Webinar include: online course, eBook download, & PDF of PowerPoint slides. CPE credit will be issued based on login time and percentage of polling questions answered.

Date

June 16, 2023 - 8 am to 4 pm (Central Time)

Price

$300.00
Late Registration - additional $50.00 one week prior WEBinar

Disclaimer

WEBinar begins promptly at the stated time.

Cancellation, Transfer and Refund Policy For Individual WEBinar Purchase.

Registration fees will be refunded in full with no cancellation fee 30+ days prior to the event.

Registration fees will be refunded in full 8 to 30 days prior to the event minus a $50.00 cancellation fee.

NO REFUNDS/TRANSFERS WILL BE ISSUED UP TO 7 DAYS PRIOR TO THE EVENT AND/OR THE EVENT START – NO EXCEPTIONS.

At the discretion of the presenters, ASTP Board of Directors, or venue, this event can be cancelled, changed to webinar format, or rescheduled to another date/format due to Covid protocols and recommendations.

For more information regarding administrative policies, complaints and refunds please contact us at 605-351-2390 or visit www.astxp.com.

The American Society of Tax Professionals has entered into an agreement with the Return Preparer Office,Internal Revenue Service, to meet the requirements of 31 Code of Federal Regulations, section 10.6(g), covering maintenance of attendance records, retention of program outlines, qualifications of instructors, and length of class hours. This agreement does not constitute an endorsement by the Return Preparer office as to the quality of the program or its contribution to the professional competence of the enrolled individual. IRS Sponsor Number T0BDV.

ALL OF OUR TAX COURSES HAVE IRS APPROVAL UNLESS OTHERWISE NOTED**