Best of Tax Planning and Retirement Ideas for Individuals

Taxes

2022 - Best of Tax Planning and Retirement Ideas for Individuals - Webinar

Price: $275.00
Level: Intermediate
Prerequisites: None
Hours: Taxes - 8

Date: August 10, 2022 - 8 am to 4 pm (CST)

Speaker: Bob Jennings

Product Description:

Give the very best accounting care to your individual clients with TaxSpeaker's course on the Best of Tax Planning and Retirement Ideas for Individuals! This course is designed to guide practitioners 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, our instructors meet you where you are to benefit your clients fully, as well as yourself. We've included key updates from 2022 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.

Course Objective:

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 the student with ideas, clearly defined compliance guidelines, written clear examples, and practitioner oriented implementation steps.

Attendee Requirements:

Earn Live CPE credit.
You must have a high speed internet connection, speakers connected to your computer, headphones or call in for audio and a monitor.
If you have more than 1 person PAID FOR and REGISTERED for the streaming webinar and all would like to watch from the same computer, please request the Proctor Form and return to us AFTER completion of the webinar in order to receive CPE credit.

Disclaimer:

Each person watching this webinar must be REGISTERED AND PAID regardless if CPE is needed or not.
Fees and Schedule - This American Society of Tax Professionals/TaxSpeaker Internet-Live webcast will begin and end promptly at stated time. All 8-hour-webcasts will break for lunch, and have 2/10-15 minute breaks.
Attendees must answer 75% of all polling questions given during the day to obtain the full hours of CPE Credits.
Cancellation, Transfer and Refund Policy Registration fees will be refunded in full for up to 30 days before the seminar. Registrations cancelled between 1-30 days before the seminar date are subject to a $50 cancellation fee. For more information regarding administrative policies, complaints and refunds please contact us at 605-351-2390 for auxiliary aid needs or visit www.ASTaxP.com.
NO REFUNDS/TRANSFERS WILL BE ISSUED AFTER THE SEMINAR BEGINS. NO EXCEPTIONS.

Continuing Education:

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.

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