ARKANSAS BANKERS ASSOCIATION

Advanced Tax Return Analysis

Thursday, April 4, 2019

GET THE TAX TOOLS TO BETTER SERVE CUSTOMERS

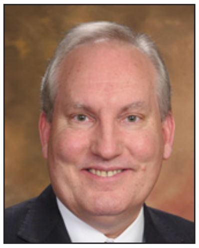
This seminar will provide the banker with several advanced tax return concepts and related analyses to help them more effectively work with their business customers.

The session will begin with a brief review of analyzing a business owner's personal 1040 tax return and the return of an LLC, S corporation, and C corporation including Schedules M-1 and M-2, Schedule K-1, pass-through transactions, and other deductions.

ON THE AGENDA

- Corporate tax issues including Business Structure, Section 179 Depreciation, and Bonus Depreciation
- Investments including Capital Gain/Loss Issues and Passive Activities
- Real estate issues including Personal Residence, Rentals, Home Offices, and 1031 Tax-Free Exchanges
- Employer provided benefits including Qualified Retirement Plans and Health Savings Accounts (HSAs)
- Retirement planning strategies including "Defined Benefit" Plans and Captive Insurance
- Estate planning issues including gifting
- Year-end tax strategies
- Changes to the tax code that impact business owners including the Tax Cuts and Jobs Act (TCJA)

ABOUT THE INSTRUCTOR



David Osburn is the founder and managing member of Osburn & Associates LLC, a Las Vegas-based business training and contract CFO firm. He also serves as a contract CFO for several clients including construction companies, medical practitioners, and real estate developers.

His extensive professional background encompasses over 30 years in banking, finance, and marketing. His bank commercial lending credentials include comprehensive loan underwriting, management, customer development, and loan work-out experience.

Additionally, Mr. Osburn holds the professional designation of Certified Credit & Risk Analyst (CCRA) as granted by the National Association of Credit Management (NACM).

WHO SHOULD ATTEND

- Commercial Lenders
- Credit Analysts
- Credit Administrators

WHEN

Thursday, April 4, 2019
9:00 a.m. – 4:30 p.m.

WHERE

Arkansas Bankers Association
1220 W. 3rd Street | Little Rock
501-376-3741

Arkansas Bankers Association
Professional Development Department

1220 West Third Street | Little Rock, Arkansas 72201 | (501) 376-3741 | www.arkbankers.org

ADVANCED TAX RETURN ANALYSIS — April 4, 2019

Arkansas Bankers Association

REGISTRATION INFORMATION

Registrant #1 Name ______________________

Title ______________________

Email ______________________

Registrant #2 Name ______________________

Title ______________________

Email ______________________

Registrant #3 Name ______________________

Title ______________________

Email ______________________

Bank/Company ______________________

Address ______________________

City ____________ **State** ______ **Zip** ____________

Billing Contact ______________________

Phone ______________________

PAYMENT INFORMATION

Charge my: ❒ Mastercard ❒ Visa

Account Number ______________________

Name on Card ______________________

Expiration Date ____________ **CSC Number** ____________

(3-digit security code on back of your card)

If you would prefer to give us your credit card information over the phone, please call the ABA Professional Development Department at (501) 376-3741.

Note: Non-Members must pay with credit card or check prior to the event.

Email: kami.coleman@arkbankers.org
Fax: (501) 376-9243

Mail: Check Payable to
Arkansas Bankers Association
Professional Development Department
1220 West Third Street
Little Rock, AR 72201

ABA USE ONLY:
Registered: __________
Amount: __________
Received: __________

REGISTRATION FEES

ABA Members:
Early Registration Price: $325; After March 6: $375

Non-Members:
Early Registration Price: $650; After March 6: $750

Registration fees include continental breakfast, instruction, materials, refreshment breaks, and lunch. To receive a registration confirmation, please provide an e-mail address on the registration form. If you do not receive a confirmation within 48 hours, please check with the ABA.

HOTEL INFORMATION

This seminar will be held at the Arkansas Bankers Association. Should you need a hotel room reservation, a Locally Negotiated Rate has been reserved for your convenience at the following hotels:

Holiday Inn Presidential | (501) 375-2100
Group Rate: $97 | Group Code: IL64N

Hilton Garden Inn | (501) 244-0044
Group Rate: $119 | Group Code: N3197385

CANCELLATION

Register before March 6 if possible. Full registration fees will be refunded if a cancellation is received before March 20. No refunds will be given for cancellations made after March 20. Substitutions are welcome and encouraged. All cancellations and substitutions must be submitted in written format prior to the event.

MORE INFORMATION

- Registration will begin at 8:30 a.m. on April 4.
- Dress for the seminar is business casual. To ensure your comfort, please bring a jacket or sweater.
- If you have any special dietary requests, please contact the ABA Professional Development Department at (501) 376-3741.
- By attending an ABA event, you are consenting to the ABA taking and using your photograph and name for use in its marketing or promotional materials, news publications or website.

CONTINUING EDUCATION

Attendants qualify for 6 Continuing Professional Education (CPE) Credits in Specialized Knowledge & Applications in group-live training. No advance preparation is required. The Arkansas Bankers Association is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org.