



Basic Tax Return Analysis

Thursday, February 28, 2019



GET A GRASP ON THE OFTEN COMPLEX AND CONFUSING TOPIC OF TAXES

Bank personnel are required to obtain and properly interpret tax returns for both commercial and consumer lending purposes. The first part of this webinar will concentrate on personal tax return analysis while the second part will focus on the analysis of various business tax returns.

PART I OBJECTIVES

- Review the basic structure of the personal 1040 federal tax return (including the various schedules and K-1 forms),
- Use analysis techniques to prepare a personal cash flow from information gleaned from the 1040 and the related schedules,
- Discuss updates in the current tax code including the Tax Cuts and Jobs Act (TCJA) and how they affect the bank's clients,
- Describe how the 1040 tax return can be used to market the bank's products and services.

PART II OBJECTIVES

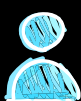
- Discuss the structure of a C corporation, S corporation, and Partnership (including LLC) tax return,
- Analyze business tax returns and prepare cash flows for these entities,
- Draw additional information from the business returns including identifying fraudulent tax returns,
- Discuss updates in the current tax code as they apply to businesses.

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.



WHO SHOULD ATTEND

- Commercial & Consumer Lenders
- Loan Documentation Specialists
- Private Bankers



WHEN

Thursday, February 28, 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

BASIC TAX RETURN

Arkansas Bankers Association

February 28, 2019

REGISTRATION INFORMATION

Registrant #1 Name _____

Title _____

Email _____

Registrant #2 Name _____

Title _____

Email _____

Registrant #3 Name _____

Title _____

Email _____

Bank/Company _____

Address _____

City _____ State _____ Zip _____

Registration 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: brenda.scarbrough@arkbankers.org
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 January 31: \$375

Non-Members:

Early Registration Price: \$650; After January 31: \$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 January 31 if possible. Full registration fees will be refunded if a cancellation is received before February 14. No refunds will be given for cancellations made after February 14. 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 February 7.
- 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.

INCLEMENT WEATHER POLICY

Cancellations due to inclement weather are refundable. If you have questions concerning the status of an ABA program due to inclement weather, please call (501) 376-3741 or visit www.arkbankers.org for further information.