ADVANCED TAX RETURN ANALYSIS

WHO SHOULD ATTEND
- Commercial Lenders
- Credit Analysts
- Relationship Managers

WHEN
May 14, 2020
9:00 a.m. – 3:00 p.m.

WHERE
Comfort of your desk—One connection for your bank means training opportunities for multiple employees

GET THE TAX TOOLS TO BETTER SERVE CUSTOMERS

This webinar 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.

The remainder of the webinar will cover the following advanced tax topics related to business clients:

- 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 L. Osburn, MBA, CCRA, is the founder of Osburn & Associates, LLC, a Business Training and Contract CFO Firm that provides seminars, webinars, and keynote speeches for bankers, CPAs, credit managers, attorneys, and business owners on topics such as Banking/Finance/Credit, Negotiation Skills, Marketing, and Management Issues.

His extensive professional background of over 30 years includes work as a Business Trainer/Contract CFO and work as a bank commercial lender including the position of Vice President/Senior Banking Officer. His banking credentials include loan underwriting, loan work-out, management, and business development.

Mr. Osburn holds the professional designation of Certified Credit & Risk Analyst (CCRA) as granted by the National Association of Credit Management (NACM).
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 ☐ American Express ☐ Discover

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. Please do not email credit card information.

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

Email: kami.coleman@arkbankers.org

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Professional Development Department
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