ARKANSAS BANKERS ASSOCIATION

# ADVANCED TAX RETURN ANALYSIS

May 14, 2020


## 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).

## 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)

## 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

## REGISTRATION FEES

**ABA Members:**
Registration Price: $250 for first connection; $200 for each additional connection

**Non-Members:**
Registration Price: $500 for first connection; $400 for each additional connection.

Each site license entitles you to one phone and one Internet connection at one location. An unlimited number of your employees may attend at that location. You must provide an e-mail address in order to receive webinar instructions.

**Note:** All registered attendees will be provided with a copy of the presentation slides and other materials relating to the Commercial Real Estate Lending webinar.

## CANCELLATION

Full registration fees will be refunded if a cancellation is received before April 30. No refunds will be given for cancellations made after April 30. All cancellations must be submitted in written format prior to the event.

## MORE INFORMATION

You will receive your log-in information and any material for the webinar via e-mail approximately one week prior to the webinar.

Unlike a short lecture webinar, this webcast will be interactive between David Osburn and the entire class using the Power Point presentation as a guide. The phone lines will remain open and dialogue will be on-going throughout the session. David will begin the session at 9:00 a.m. CT, with a 30-minute lunch from Noon to 12:30 p.m. CT, and the session will conclude at 3:00 p.m. CT. There will also be short breaks throughout the event.

If you need additional information, please contact the ABA Professional Development Department at (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

Arkansas Bankers Association

**May 14, 2020**

## 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
**Fax:** (501) 376-9243
**Mail:** Check Payable to
Arkansas Bankers Association
Professional Development Department
1220 West Third Street
Little Rock, AR 72201

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**Registered:** ____________
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