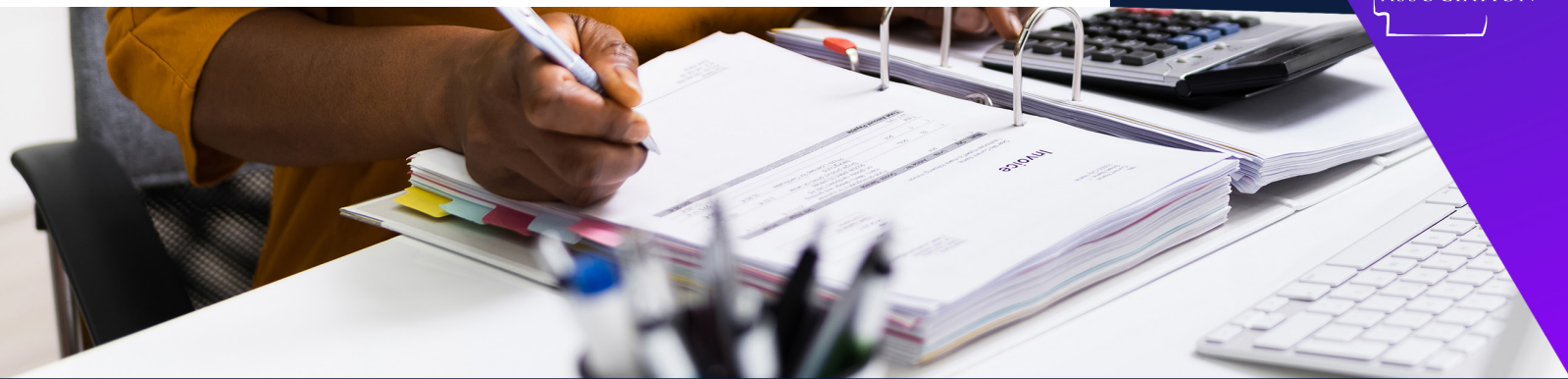


Virtual Learning



ADVANCED TAX RETURN ANALYSIS FOR THE BANKER

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" (DB) Plans
- Estate Planning Issues including Gifting
- Year-End Tax Strategies
- Changes to the Tax Code, including the OBBB (One Big Beautiful Bill), that impact Businesses and Business Owners/ Guarantors

When:

July 27, 2026

9:00 a.m. - 3:00 p.m.

Where:

The comfort of your desk.

Who Should Attend:

Commercial lenders, credit analysts, relationship managers, credit administrators

ABOUT THE INSTRUCTOR



David L. Osburn is the founder of Osburn & Associates, LLC, a Business Training and Contract CFO Firm that provides seminars, webinars, and keynote speeches for bankers, CPAs, attorneys, credit managers, and business owners on topics such as Banking/Finance/Credit, Negotiation Skills, Marketing, and Management Issues. Mr. Osburn's Contract CFO clients include medical practitioners, financial institutions, law firms, CPA firms, architects, real estate developers, and contractors. His extensive professional background encompasses 26 years as a Business Trainer/ Contract CFO and 16 years 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 has been an adjunct college professor for over 30 years teaching Accounting, Economics, Finance, Banking, Marketing, Management, and Business Law. He has an MBA from Utah State University, a BS in Finance from Brigham Young University, and is a graduate of the ABA National Commercial Lending School held at the University of Oklahoma. Additionally, Mr. Osburn holds the professional designation of Certified Credit & Risk Analyst (CCRA) as granted by the National Association of Credit Management (NACM).

REGISTRATION FEES

ABA Members:

Registration Price: \$390

Non-Members:

Registration Price: \$780

NOTE

Registration fees are per person, not connection. Please register each person in attendance separately.

CANCELLATION

Full registration fees will be refunded if a cancellation is received before July 13. No refunds will be given for cancellations made after July 13. All cancellations must be submitted in written format prior to the event.

VIRTUAL LIVE FORMAT

Attendees will need Internet access and a standard web browser to join this video and web conferencing. They will receive an email with a link to join the virtual meeting, handouts, and any additional information a few days before the event.

You do not need your own Zoom account. You will use the link, meeting ID and password we provide.

- You can log in on a desktop computer, laptop or download the Zoom app on your smart device.
- Internet access
- Audio on computer or a phone line

ADVANCED TAX RETURN ANALYSIS FOR THE BANKER

JULY 27, 2026

Bank/Company Name _____ Phone _____

Registrant Name _____ Title _____ E-mail _____

Registrant Name _____ Title _____ E-mail _____

Address _____ City _____ State _____ Zip _____

Registration Contact _____ Phone _____ E-mail _____

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)

Billing Zip Code _____

If you would prefer to pay via credit card over the phone, please call the ABA at (501) 376-3741. Please do not email your credit card information.

Email: marketing@arkbankers.org

Fax: (501) 376-9243

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

ABA USE ONLY:

Registered: _____

Amount: _____

Received: _____

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