

SUMMER OF KNOWLEDGE

3 Opportunities to Expand Your Expertise

1 Trust Return Seminar

with Chris Bird, EA, CFP and
Linda Wegge EA, ATA, ATP

The seminar will be a comprehensive review of the Trust Tax Return document and its correct preparation. It will include an explanation of the importance of the trust document and understanding of how the trust is set up. The seminar will discuss selecting the proper year end for the trust, the type of trust, and determining the includable income and deductible expenses allowable by the trust. Determining income in respect of a decedent will also be a topic covered in this worthwhile presentation.

ALSO Included:
Continental Breakfast
& Hot Buffet Lunch



2 Partnership Seminar

with Chris Bird, EA, CFP and
Robert Jaminson CPA, PhD

The seminar will be a review of various partnership tax issues highlighting:

- Treatment of the limited liability company as a partnership
- Partnership income allocations to partners
- Debt sharing and partner basis
- Guaranteed payments and self-employment tax issues
- Nontaxable cash and property distributions
- Complex and taxable distribution rules
- Sale of a partnership interest
- Special basis adjustments

ALSO Included:
Continental Breakfast
& Hot Buffet Lunch



3 EA Test Preparation Course

with Chris Bird, EA, CFP

This seven day program will help you master tax basics and be equipped to pass the IRS Special Enrollment Exam (SEE) and become an EA. The registration price includes the Fast Forward Academy basic EA Book Bundle.

Attendees will earn up to five hours of Federal Tax continuing education credit for each of Parts 1 and 2, and two credit hours of Ethics for Part 3. 12 CE hours is the maximum amount that can be earned. CE is not available to EAs, or ERPA's.

Part 1 – Individuals Three days of training will include Preliminary work to prepare tax returns, Income and Assets, Deductions and Credits, Taxation and Advice.

Part 2 – Businesses Three days of training will include Business Entities, Business Financial Information and Specialized Returns.

Part 3 – Representation, Practice, and Procedures Identify the standards for preparing tax returns. Explain the rules and restrictions of practicing before the IRS and review the rules in the circular 230 that govern the practice of preparing tax returns professionally.

Lunch is on your own. An onsite dining option is available at the Skokie location. There are several dining options nearby the Gateway Center.

Call for discount information for 5 or more registrants from the same firm.

"Updates on most significant tax law changes in one seminar. Speaker is excellent."

– Christine M.

"The seminar is well organized; I can't imagine how to improve it."

– Sherman W.

"Chris Bird still ROCKS! Superb workbook!"

– Mark L.

"As always, Chris hits the big stuff, doesn't get too bogged down in details. Plus I've never seen a speaker with more gusto – so entertaining!"

– Sarah B.

Course Objectives

These courses are at an intermediate level — no prerequisites are required. Our courses meet all Internal Revenue Service, and States of Illinois and Missouri continuing education requirements, as well as CFP requirements. The Trust Return and Partnership Seminars enables the participant to stay abreast of new developments in tax law. The EA Test Preparation Course gives the participant the knowledge and the confidence to pass the Enrolled Agent Exam.

Who Should Attend

- Certified Public Accountants (CPA)
- Enrolled Agents (EA)
- Certified Financial Planners (CFP)
- Attorneys
- Non Licensed Accountants

PRESENTERS



Chris Bird, EA, CFP, is a tax expert and national lecturer on individual and corporate income taxes, and real estate issues. His background includes 16 years of experience as an IRS agent, in Springfield, Illinois, where he served as a field agent, branch manager, and training director. He is also a faculty member of the REALTOR® Institute programs of Missouri, Illinois, Virginia, West Virginia and Wyoming.

Chris is a Certified Financial Planner, and held an Enrolled Agent Card for more than twenty years. Chris has taken the EA exam fourteen times most recently in 2015. He has been a major contributor to the *University of Illinois Farm Income Tax School Manual*, and an instructor at their seminars held throughout the state of Illinois. He has presented tax courses before thousands of CPAs, attorneys and enrolled practitioners groups for many years. Chris is a frequent speaker for Professional Tax and Accounting Associations nationwide.



Robert W. Jamison, CPA, PhD, is Professor Emeritus of Accounting at Indiana University, Purdue University, Indianapolis (IUPUI). His principal area of specialization is S Corporations. He is the author of *S Corporation Taxation*, and co-author of *Multistate Tax Guide to Pass Through Entities*, both of which are published annually by CCH, a Wolters Kluwer business.

His articles have appeared in various publications including: *Practical Tax Strategies*, *Journal of Passthrough Entities*, *The Tax Adviser*, *Journal of S Corporation Taxation*, and *The Journal of Accountancy*. Professor Jamison has taught many professional education programs for national and local accounting firms and has developed material used in their continuing education programs. He has been a lecturer in AICPA programs and has authored several AICPA tax courses. He is a chapter author in the *Van-Griner Taxation Series* of textbooks and a regular contributor to the *Land Grant University Tax Education Foundation, Inc. National Income Tax Workbook*.



Linda Wegge, EA, ATA, ATP, has been practicing taxation and accounting for 30 years. Linda earned her Enrolled Agent designation in 1996. Practicing in the northern Chicago suburb of Grayslake, Linda's firm specializes in a wide array of tax return preparation such as individual, estate, trust, and gift, including corporation returns. Linda is a Fellow of NTPI. She has enjoyed being a public speaker and educating fellow professionals for more than 10 years.

Register for both the Trust Return and Partnership Seminars and receive \$20 total discount.

Continental Breakfast & Buffet Lunch Included

Trust Return Seminar

Gateway Center Collinsville, One Gateway Drive, Collinsville, Illinois
Wednesday, July 6, 2016

Skokie Holiday Inn, 5300 West Touhy Avenue, Skokie, Illinois
Thursday, July 7, 2016

Check In Time: 8:00 a.m. to 8:30 a.m.

Seminar: 8:30 a.m. to 4:40 p.m. (lunch break 12:00 p.m. to 12:45 p.m.)

Fees \$214 | Early Bird: \$199
(Received on or before Friday, June 24, 2016)
CFP Reporting and MCLE reporting fees of \$20.00

Course Program Numbers:

BDGH2-00038-16-I (8 hours CE Federal Tax Legislation)

Continental Breakfast & Buffet Lunch Included

Partnership Seminar

Skokie Holiday Inn, 5300 West Touhy Avenue, Skokie, Illinois
Wednesday, August 3, 2016

Gateway Center Collinsville, One Gateway Drive, Collinsville, Illinois
Thursday, August 4, 2016

Check In Time: 8:00 a.m. to 8:30 a.m.

Seminar: 8:30 a.m. to 4:40 p.m. (lunch break 12:00 p.m. to 12:45 p.m.)

Fees \$214 | Early Bird: \$199
(Received on or before Friday, July 22, 2016)
CFP Reporting and MCLE reporting fees of \$20.00

Course Program Numbers:

BDGH2-00037-16-I (8 hours CE Federal Tax Legislation)

EA Exam Preparation Course Seven Day Training

Skokie Holiday Inn, 5300 West Touhy Avenue, Skokie, Illinois

Thursday, June 2, 2016	EA Part 3	One day
Monday, June 20, 2016	EA Part 1	Day 1
Tuesday, June 21, 2016	EA Part 1	Day 2
Wednesday, June 22, 2016	EA Part 1	Day 3
Monday, July 11, 2016	EA Part 2	Day 1
Tuesday, July 12, 2016	EA Part 2	Day 2
Wednesday, July 13, 2016	EA Part 2	Day 3

Gateway Center, One Gateway Drive, Collinsville, Illinois

Friday, June 3, 2016	EA Part 3	One day
Monday, June 27, 2016	EA Part 1	Day 1
Tuesday, June 28, 2016	EA Part 1	Day 2
Wednesday, June 29, 2016	EA Part 1	Day 3
Monday, July 18, 2016	EA Part 2	Day 1
Tuesday, July 19, 2016	EA Part 2	Day 2
Wednesday, July 20, 2016	EA Part 2	Day 3

Check In Time: 8:00 to 8:30 a.m.

Seminar: 8:30 a.m. to 4:40 p.m.

Fees: Complete training \$945 | Early Bird: \$895 (Received on or before Friday, May 20, 2016)

Course Program Numbers:

EA Test Preparation Part 3 BDGH2-E-00045-16-I Ethics (2 hours CE)

EA Test Preparation Part 1 BDGH2-P-000 (39, 40, & 41) 3 days total (5 hours CE)

EA Test Preparation Part 2 BDGH2-P-000 (42, 43, & 44) 3 days total (5 hours CE)



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REGISTER
EARLY

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Seminars, at all locations, are from 8:30 a.m. until 4:40 p.m. Check in: 8:00 a.m. – 8:30 a.m.

Maps to all locations can be found on our web site at www.taxseminars.com

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DISCOUNT: Register for both the Partnership and Trust Return seminars and receive \$20 total discount.

Trust Return Seminar (Continental Breakfast & Buffet lunch included in fee): **Select one** \$ _____

Collinsville • Wednesday, July 6, 2016 • \$214 | **Early Bird: \$199** (Received on or before Friday, June 24, 2016)

Skokie • Thursday, July 7, 2016 • \$214 | **Early Bird: \$199** (Received on or before Friday, June 24, 2016)

Partnership Seminar (Continental Breakfast Buffet lunch included in fee): **Select one** \$ _____

Skokie • Wednesday, August 3, 2016 • \$214 | **Early Bird: \$199** (Received on or before Friday, July 22, 2016)

Collinsville • Thursday, August 4, 2016 • \$214 | **Early Bird: \$199** (Received on or before Friday, July 22, 2016)

EA Exam Preparation Seven Day Course

(Dine on your own.)

Skokie • \$945 | **Early Bird: \$895** (Received on or before Friday, May 20, 2016) \$ _____

Collinsville • \$945 | **Early Bird: \$895** (Received on or before Friday, May 20, 2016) \$ _____

CFP Credit Eligible — \$20 \$ _____

MCLE Reporting Fee — \$20 \$ _____

Two Seminar Discount — \$20 \$ _____

Total Amount of check (payable to "TaxSeminars.Com") or credit card charge \$ _____

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Walk in registrations
(if space and materials are available)
will be charged an additional \$35.

Call for discount for five
or more registrants.

Sponsor Information

TaxSeminars.com, Inc. is an IRS Approved Continuing Education Provider (Number BDGH2), registered with the Illinois Department of Professional Regulation (License No. 158-001283) registered with Certified Financial Planning Board of Standards (Sponsor 4034) and Illinois MCLE Board (TAX0001). Except for the Enrolled Agents Test Preparation Class, all courses are prepared to fulfill the continuing education requirements for Certified Public Accountants, Enrolled Agents, Attorneys and Certified Financial Planners. Written proof of attendance will be provided each day of the seminar. To obtain the credit you must check in each morning and hand in an evaluation sheet prior to leaving. Evaluation sheets will **not be accepted** after the day of the seminar. Your attendance will be reported to the IRS Continuing Education Processing Center.

Cancellation Policy

Registration fees will be refunded in full, less a \$25 service fee if written notice or confirmed phone cancellation is received on or before 10 business days before the day of the seminar. If cancellation notice is received 4 to 9 business days before the day of the seminar there will be a \$45 service charge. If notice of cancellation is received 2 to 3 business days before the day of the seminar there will be no cash refund; however there will be a \$45 service charge and the balance of the fee will be able to be applied to a future seminar in the next year. Cancellations will not be accepted on the business day before or the day of the seminar. A colleague may be substituted if you call prior to the date of the seminar.

EA Test Preparation Seminar Cancellation Policy: In the event of inadequate registration for the EA Test Preparation classes TaxSeminars.com, Inc. reserves the right to cancel the classes by giving five days notice of the cancellation by either phone, phone message, or e-mail and refunding the full amount for the classes.

Upcoming Seminars

offered by TaxSeminars.com, Inc.

Annual Tax Update (Tax Year 2016)
with 700 page *National Income Tax Workbook & CD*

> **Urbana (Champaign) Holiday Inn**
Mondays, October 31, and November 7, 2016

> **Meridian Banquets, Rolling Meadow**
Tuesdays, November 1, and November 8, 2016

> **Skokie Holiday Inn, Skokie**
Wednesdays, November 2, and November 9, 2016

> **Carol Stream Holiday Inn, Carol Stream**
Saturdays, November 5, and November 12, 2016

> **The Regency Conference Center, O'Fallon**
Monday, November 14; Tuesday, November 15, 2016

> **The Regency Conference Center, O'Fallon**
Mondays, November 28, 2016 and December 5, 2016

> **Gateway Center, Collinsville**
Fridays, December 2, and December 9, 2016

Mail Registration Form & Check to: TaxSeminars.Com, 7952 W. Oakton St., Niles, IL 60714
or fax Credit Card registration to: 877-regtaxed (877.734.8293) or 847.698.9898