

## 1040 Tax Seminar

### Central/South Central Joint Education Committee

# Jennings—TaxSpeaker 1040 Tax In Depth

Monday, November 18th & Tuesday, November 19th, 2019

**Camp Hill, Radisson Hotel**  
**1150 Camp Hill Bypass**  
**Camp Hill, PA 17011**  
**Hotel Phone: 717-763-7117**

For discounted overnight hotel accommodations at a rate of \$122 (taxes, etc. not included), please call 717-763-7117 and reserve by 10/18/19.

**Registration: 7:30 AM**  
**Start/End Time: 8:00 AM–4:30 PM**  
**Course Level: Basic**  
**CPE: 16 Hours Federal Tax**  
*\*Also qualifies for 14 hours CLE credits for Attorneys*

PSTAP is an approved continuing professional education sponsor.  
PA #PX-000501L, NJ #20CE0015920, NY #002280, IRS CE #E3S5R

**SPEAKERS: Bob Jennings, CPA, EA, CFP & Terry Bakker, CPA EA**

**PSTAP Members: \$325.00**

**Non Members: \$395.00**

- Registration fee includes seminar workbook, continental breakfast, lunch & refreshment breaks
- **REGISTER** Online: www.pstapcpe.com \*\*Mail: PSTAP, Attn: Seminar Registrations, 20 Erford Road, Suite 200A, Lemoyne, PA 17043
- Seminar Confirmations—Sent upon registration, via email only—please provide your email address below
- Questions??? Contact PSTAP Executive Office at 1-800-270-3352 or by email at info@pstap.org
- Refund Policy: Cancellations received by **November 12, 2019** will be refunded less a \$35 service fee, 50% refunded thereafter.
- No Show—No Refund—No Exceptions. Overnight Accommodations: Call the Camp Hill Radisson 717-763-7117.

Registration Form: *(one form per registration—photocopy for additional registrants)*

**REGISTRATION DEADLINE: 11/12/19**

First Name \_\_\_\_\_ MI \_\_\_\_\_ Last \_\_\_\_\_ PSTAP ID #: \_\_\_\_\_ PTIN # \_\_\_\_\_

Firm: \_\_\_\_\_ Phone: ( ) \_\_\_\_\_

Street Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Email Address \_\_\_\_\_ License Number—CPA/PA—Required \_\_\_\_\_

*Please indicate Rate*

Check Enclosed—Payable to PSTAP Joint Education Committee —Mailed to the above address \*\*

**PSTAP Member \$325**  VISA/Amex Acct # \_\_\_\_\_ Exp: \_\_\_\_\_ CVV: \_\_\_\_\_

**Non Member \$395**  MASTERCARD Acct # \_\_\_\_\_ Exp: \_\_\_\_\_ CVV: \_\_\_\_\_

\*Please include additional \$21.00 for CLE credits

Signature: \_\_\_\_\_

\*Please do not combine meeting & seminar fees on same check. NOV18&19 JEC Jennings1040 Camp Hill 111119  
IRS:E3S5R-; E3S5R- All Topics Subject to Change

## **Jennings-TaxSpeaker 1040 Tax In Depth Seminar Course Description:**

Wow. That's all we can say about America's only independently awarded recognition for multiple years as the top Research live-course CPE manual in the country. With over 1,000 pages of practitioner-written guidance, organized in the logical form order used by the IRS to assemble returns, participants receive both a printed and electronic manual. Written and taught by actual practitioners known for high-energy presentations in educational and humorous, yet informative manners, this course has been ranked as TaxSpeaker's® finest course for 15 straight years. Because all of our speakers are required to personally prepare, for compensation at least 200 returns annually, participants are assured of receiving practical guidance, excellent speakers, and dozens of checklists, worksheets and client letters while obtaining the latest "What's New" information.

Our 2019 course will include detailed coverage, with planning ideas of the latest changes from the Tax Cuts and Jobs Act, special focus coverage of sole proprietorship issues and emerging economy issues (Consumer-to-consumer sales, Crypto-Currency, etc.) as well as our annual review of common preparation issues and new court cases and IRS guidance. Because this is TaxSpeaker's® flagship course participants are assured of receiving the best, most thorough and hands-on individual tax preparation education available in the country, and the independently awarded recognition proves it.

### **Event Objective:**

Upon completion of this course, you will be able to properly report amounts on clients' Form 1040 returns that appear on various 3rd party forms, properly prepare Form 1040 and its various schedules; properly file the above forms with Form 1040 when required; Determine if clients qualify to take various credits on their 1040 returns to reduce taxable income; Properly deduct disaster losses on Form 1040; Provide clients with methods of saving for their children's college education and determine if they qualify for various education credits and deductions to reduce taxable income; Prepare to handle IRS audits of your clients; Comply with the requirements imposed by the Circular 230 regulations; Advise clients who are members of the military on special taxation rules.

### **Speaker Bios:**

Bob is a nationally renowned author and speaker, presenting continuing education classes to over 100,000 tax professionals over the last 20 years all over the world. Bob is a licensed CPA (Indiana), and an IRS Enrolled Agent. Bob is also a prolific author and has published over 60 professional articles in such magazines as the Journal of Accountancy as well as many other professional and consumer publications; annually authors several tax, accounting and technology manuals; and is a regular columnist for FoxBusiness.com. As the founder of his own regional CPA firm in 1984, Bob has dealt exclusively with individual and small business financial issues for over 30 years. Bob appears regularly in the media and has been quoted extensively by numerous publications. He has recorded an extensive number of information videos, DVD's and instructional clips available on his website at TaxSpeaker.com.

Terry O'Leary Bakker CPA, EA, LTC 67985-C is the owner of O'Leary's Tax Service, Ltd. in downtown Vancouver, Washington, across the river from Portland, Oregon. Terry graduated with her BS in Business Administration: Accounting from Portland State University in 1988 and has worked in tax ever since. She became an Enrolled Agent in 2008 after obtaining the Oregon Tax Practitioner (1988) and Consultant (2003) licenses. In addition to running an active tax practice serving the needs of individuals and small business, Terry has a commitment to the profession. She is a Past President of the Oregon Association of Independent Accountants, as well as holding other positions, including head of the Education Committee. As part of her commitment, she teaches the Enrolled Agents Preparation course for her Association and has spoken for all of the tax preparation associations in Oregon.