

The **All-Star** Tax Series

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Continuing education for CPAs, EAs and attorneys



2025

2026



2025–2026 Schedule at a glance

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About The All-Star Tax Series

The All-Star Tax Series, sponsored by Edward Jones, is an accredited program that offers tax and legal professionals an opportunity to earn continuing education credits via webinar.

Courses are backed by a **100% satisfaction** guarantee. If you are dissatisfied with a course, please contact The All-Star Tax Series via the information below.

Course information

Broadcast times:

Eastern: 2 p.m. – 5 p.m.

Central: 1 p.m. – 4 p.m.

Mountain: noon – 3 p.m.

Pacific: 11 a.m. – 2 p.m.

Broadcast location: Webinar only

Format: Webinar with Q&A by chat

NASBA field of study: Taxes

Advance preparation: None required, but you may download your course materials two days prior to your course; see your confirmation email for details.

Continuing education

CPE and IRS credits: Three hours

CLE credits: Available in some states; visit allstartax.com for your state's details.

Contact information

Phone: 610-994-9595

Email: info@allstartax.com

Web: allstartax.com



2025–2026 course catalog

Tax professionals' guide to TCJA extenders and the status of tax reform in 2025

May 7 & 15, 2025

As practitioners enter tax season, President Trump and Congress are at work on tax law changes. This program will update you regarding the current state of tax law, focusing on enacted changes and late-breaking considerations. The program will cover tax law for 2025 and forward, including the latest on Tax Cuts and Jobs Act (TCJA) extenders and anything else relevant and new.

Course level: Basic

IRS credit category: Federal tax law

Health Savings Accounts and other tax-favored health plans

June 4 & 12, 2025

Health Savings Account (HSAs) are of great interest to many individual tax clients. An HSA is a tax-advantaged trust or custodial account to save and pay for qualified medical expenses. An HSA can also serve as a retirement account. This program provides an overview of HSAs, Medical Savings Accounts (MSAs), health Flexible Spending Arrangements (FSAs) and Health Reimbursement Arrangements (HRAs).

Course level: Basic

IRS credit category: Federal tax law

Calculating partner basis/capital accounts and S corp shareholder stock/debt basis

June 18 & 24, 2025

Tax practitioners advising business clients must understand tax issues that impact pass-through entities, including rules relating to an S corporation shareholder's stock and debt basis and a partner's basis in their partnership interest. Equally important for partners is calculation and reporting of the partner's capital account. This program covers S corp stock, debt basis and how they relate when losses are allocated to shareholders.

Course level: Basic

IRS credit category: Federal tax law

Critical issues for general tax practitioners regarding IRAs and retirement plans

July 16 & 24, 2025

Practitioners advising IRA and qualified plan owners must be able to address client concerns about these accounts. Challenging questions can arise about life-changing events such as birth, death, marriage or mental/physical incompetence of the account owner. This program will cover these issues, recent tax law changes, including final required minimum distribution (RMD) regulations, and other critical changes.

Course level: Basic

IRS credit category: Federal tax law



2025–2026 course catalog

How to effectively represent clients under audit by the IRS

Aug. 6 & 14, 2025

2025 will bring a new agenda to the IRS and audits. This program features experienced tax practitioners explaining the status of IRS audits, which entities and transactions are specifically targeted for audit and how tax practitioners should manage an audit when a client receives a notice of audit. Our panelists are monitoring IRS and audit developments in light of the new President, Congress and IRS leadership.

Course level: Intermediate

IRS credit category: Federal tax law

Current status of 2025 tax legislation

Aug. 20 & 26, 2025

Because the Republicans control Congress and the Presidency, we anticipate massive tax changes that will impact individual and business owner taxpayers. This program presents the changes professionals need to know to navigate tax reform in 2025 and after. The course will explore the extension of Tax Cuts and Jobs Act (TCJA) provisions. We will also explain new, standalone tax legislation separate from TCJA provisions.

Course level: Basic

IRS credit category: Federal tax law

Understanding Form 1099-DA, Form 1099-K and other Form 1099 issues

Sept. 17 & 25, 2025

There are more than 20 different types of Form 1099, including 1099-DA, 1099-K, 1099-NEC, 1099-S and 1099-MISC, and practitioners must be aware of their filing requirements. This program will cover several of the most widely applicable 1099 versions so tax practitioners can advise their clients who are receiving them or required to send them to other taxpayers.

Course level: Basic

IRS credit category: Federal tax law

Year-end tax planning strategies for individuals and small and medium-sized businesses

Oct. 22 & 28, 2025

2025 is particularly important for tax planning because of the possibility of significant tax law changes. Individuals and business owners should review their 2025 and 2026 tax situations and identify opportunities for reducing, deferring or accelerating tax obligations. This program examines options individual and business clients have to reduce upcoming tax liabilities while taking into account any new planning opportunities.

Course level: Basic

IRS credit category: Federal tax law



2025–2026 course catalog

What tax practitioners need to know about Medicare and Social Security

Nov. 5 & 13, 2025

As clients age, accounting and finance professionals often field questions about Social Security and Medicare, which are essential parts of most individuals' plans for retirement. To advise such clients, it is important to have a basic understanding of these two complex programs. This course addresses commonly asked questions tax practitioners receive about Social Security and Medicare.

Course level: Basic

IRS credit category: Federal tax law

Individual tax update and planning strategies

Nov. 19 & 25, 2025

This is a comprehensive and in-depth program preparing tax practitioners to advise their individual clients about important tax changes enacted in 2025. We anticipate the course will discuss new legislation impacting individuals as well as extension of some or all Tax Cuts and Jobs Act provisions that affect individuals. It will also include individual-related tax changes resulting from IRS regulations and court cases.

Course level: Update

IRS credit category: Federal tax law update

Business tax update and planning strategies

Dec. 10 & 17, 2025

This program reviews business-related tax changes enacted in 2025 that will affect businesses and their owners. The panelists will focus on extension of business-related provisions of the Tax Cuts and Jobs Act and new business-related tax legislation enacted on a standalone basis or as part of a large legislative act. The program may also cover 2025 IRS rulings and notices, as well as court cases that affect the taxation of businesses.

Course level: Update

IRS credit category: Federal tax law update

Getting ready for tax season: New IRS forms and compliance requirements

Jan. 14 & 22, 2026

Each year, the IRS changes its forms and instructions in light of tax law changes affecting individual and business taxpayers. Tax practitioners should be aware of how forms have been modified to reflect tax law changes and be able to explain these updates to their clients, particularly if a client's tax liability changes significantly. This program covers new IRS tax forms and compliance requirements for the 2026 tax season.

Course level: Basic

IRS credit category: Federal tax law

For complete course descriptions, visit allstartax.com.



2025–2026 registration

Individuals can save by attending multiple courses in the series, or firms may divide registrations between attendees and courses in any combination that fits their needs.

Program fees:

Season Pass purchase:

12 courses	\$599	Save up to \$589
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(Season Pass available to individuals only.)

Single-course purchase:

Three-hour course	\$99 per course
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Multiple-course purchases:

Four or more	\$79.20 per course	Save 20%
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For your convenience, we accept VISA, MasterCard, American Express and Discover.

Online registration: Visit allstartax.com to register.

Advance preparation: None required, but you may download your course materials two days prior to your course; see your confirmation email for details.

Cancellations/Refunds: Full refunds will be issued for cancellations received up to 5 p.m. ET of the business day before the broadcast. A registrant may, at no added cost, transfer an individual course registration to another course in the 2025–2026 series or to another person at any time up to 5 p.m. ET of the business day before the broadcast. No refund or transfer to another person is available for Season Passes, and registrations cannot be carried over to subsequent seasons.

To transfer your registration, log in to your account at allstartax.com. To cancel, email info@allstartax.com. Branch offices cannot process cancellation or transfer requests.



Continuing education credit

All-Star Tax Series broadcasts qualify as continuing education courses for CPAs and EAs. Attorneys in some states may earn CLE credit.

If you wish to apply a course toward your continuing education requirements, you will have an opportunity to indicate this prior to or after course completion.

CPAs: Each All-Star Tax Series course qualifies for three CPE credit hours. [NASBA-registered CPE sponsor: Surgent McCoy CPE, LLC; sponsor ID numbers: New York - 000618; Texas - 9314; NASBA Registry (all other states) - 103212]

Attendance will be verified via online attendance checks. A CPE certificate is typically available within one business day. Attendees are responsible for reporting earned credits to their state boards of accountancy according to individual state guidelines.

Surgent McCoy CPE, LLC is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org.



Attorneys: Visit allstartax.com to find out if courses are approved for CLE credit in your state.

Enrolled Agents: Each All-Star Tax Series course is accepted by the IRS for three credit hours toward annual CE requirements. (IRS-approved CE provider: Surgent McCoy CPE, LLC; provider ID number – QDEJK)



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