

The All-Star Tax Series



SPONSORED BY

Edward Jones®

2018–2019 Continuing Education for CPAs, EAs and Attorneys

Join us for the next course in the series:

New Planning Strategies for Retirement Account Rollovers and Transfers

Wednesday, Aug. 15, 2018 (Webinar Dates: Aug. 15, Aug. 23)

The rules relating to IRAs and retirement accounts generally are quite complicated, so the importance of tax professionals giving accurate advice is critical. When it comes to rollovers and transfers of IRAs and qualified plans, every word in the rules is significant. The panel of experts will take tax practitioners through this complex topic, offering planning strategies to avoid and mitigate mistakes. This program is designed for any tax professional who has clients with IRAs and qualified plans.

Key Topics

- Differences between retirement account transfers and rollovers
- Transferring funds from one deferred account to another
- What to do when a client inherits an IRA or qualified plan
- Avoiding the 10% penalty on certain early distributions from IRAs and qualified plans
- Roth IRA conversions, rollovers and distributions
- How to avoid and correct rollover mistakes
- Net unrealized appreciation (NUA)
- Required minimum distributions

Panelists

Denise Appleby, APA, CISP, CRPS, CRC
Claudia Hill, EA
Michael J. Tucker, CPA, LL.M. (moderator)

Panelists are subject to change.

SPECIAL OFFER: All attendees receive a free download of Denise Appleby's 2018 IRA Beneficiary Options Quick Reference Guide.

See details at www.allstartax.com.

Details

Course Level: Intermediate

CPE and IRS Credits: Three hours

IRS Credit Category: Federal tax law

CLE Credits: Subject to state variations; visit www.allstartax.com for your state's details.

This course is not approved for CLE in New Mexico.

Participate in this course at [my/our] branch office at [TIME] Wednesday, Aug. 15.
Register today at www.allstartax.com. FA Number: [FANUMBER]



Previous participants speak up:

“All information was well explained, including practical knowledge based on the professional experience of the instructors.”

“Each year I pick up something new I didn’t know or understand the previous year. Thank you.”

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 at nearby Edward Jones branch offices, offsite at firms and 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

Courses are three-hour televised broadcasts packed with information designed to help you navigate the complexities of today’s tax landscape and presented by experienced tax, accounting and legal professionals.

Format: Televised broadcast or webinar with email Q&A forum

NASBA Field of Study: Taxes

CPE and IRS Credits: Three hours

CLE Credits: Subject to state variations; visit **www.allstartax.com** for your state’s details.

Contact Information

Phone: 610-994-9595

Email: info@allstartax.com

Web: www.allstartax.com

2018–2019

Schedule at a Glance

Featured Broadcast

New Planning Strategies for Retirement Account Rollovers and Transfers

Wednesday, Aug. 15, 2018 (Webinar dates: Aug. 15, Aug. 23)

(See front cover for details.)

NEW
Programs on
the impact of the
Tax Cuts and
Jobs Act!

Upcoming Broadcasts

Sept. 26, 2018	Social Security and Medicare Planning in 2018
Oct. 24, 2018	A Complete Guide to Administering an Estate in Probate
Nov. 7, 2018	Maximizing Depreciation and Expense Deductions after Tax Reform
Nov. 28, 2018	Individual Tax Update and Year-end Planning Strategies
Dec. 12, 2018	Business Tax Update and Year-end Planning Strategies
Jan. 16, 2019	Getting Ready for Tax Season: New IRS Forms and Compliance Requirements

Dates still available for:

Helping Clients Pay for Retirement: Long-term Care, Health Insurance,
Medicaid, Reverse Mortgages and More

(Broadcast date: July 18; Webinar dates: July 18, July 25)

SAVE
with
multiple-course
purchases!

The more courses you attend, the more you save!

- ★ **Single course:** just **\$89**
- ★ **Four or more:** save **10%**
- ★ **Six or more:** save **20%**
- ★ **Eight or more:** save **35%**

Take advantage of the savings and visit www.allstartax.com to register today!

(Multiple-course discounts may be used by individuals or firms.)

Register today at www.allstartax.com.



Upcoming Broadcasts

Social Security and Medicare Planning in 2018

Wednesday, Sept. 26, 2018 (Webinar dates: Sept. 26, Oct. 2)

As the population of the United States ages, many clients ask about the best time to take Social Security benefits, as well as when they are eligible for Medicare, what it covers, how much it costs and how Medicare and Social Security rules interact with one another. This program addresses complex Social Security and Medicare topics with nationally renowned experts so tax practitioners can advise their clients in 2018 and beyond.

Key Topics

- When and how individuals and couples should begin to take Social Security retirement benefits
- Planning strategies to maximize Social Security benefits
- Maximizing Social Security benefits for married couples, divorced couples and surviving spouses
- The ins and outs of Medicare
- When an individual is eligible for Medicare and how to enroll
- Evaluating health insurance options when a client is eligible for Medicare and has other coverage

Details

Course Level: Basic

IRS Credit Category: Federal tax law

A Complete Guide to Administering an Estate in Probate

Wednesday, Oct. 24, 2018 (Webinar dates: Oct. 24, Nov. 1)

Administering and settling a decedent's estate can be a difficult process. A variety of challenges may arise when settling an estate, including safeguarding the decedent's property during the administration process, paying debts and taxes, and distributing the assets of the estate. This program offers a non-state-specific review of action items for administering and settling an estate in probate.

Key Topics

- Tax advisor/attorney team roles and functions
- The probate process, including costs and time
- Practitioner steps to safeguard estate assets and start estate administration
- Federal and state tax issues, including tax year of the estate
- Safe interim and final distribution of estate assets to beneficiaries
- Integrating the decedent's final Form 1040 with the estate's Form 1041

Details

Course Level: Intermediate

IRS Credit Category: Federal tax law



Maximizing Depreciation and Expense Deductions after Tax Reform

Wednesday, Nov. 7, 2018 (Webinar dates: Nov. 7, Nov. 15)

The Tax Cuts and Jobs Act expanded bonus and Section 179 depreciation deductions for businesses. Business owners may need help determining if maximizing depreciation might reduce or eliminate another beneficial provision, such as the Section 199A 20% deduction. This practical program will update tax practitioners so they can help advise their clients on the expanded depreciation rules.

Key Topics

- New rules for Section 179 and bonus depreciation
- Changes related to listed property
- Depreciation rules related to qualified improvement property after tax reform
- Planning strategies to maximize return on purchase of business property based on the new depreciation rules
- Interaction of the repair regulations and the revised depreciation rules

Details

Course Level: Basic

IRS Credit Category: Federal tax law

Individual Tax Update and Year-end Planning Strategies

Wednesday, Nov. 28, 2018 (Webinar dates: Nov. 28, Dec. 6)

With less than two months left before the end of 2018, it is time to discuss tax planning for individual clients and their families, including discussion of the new tax legislation enacted at the end of 2017 and IRS guidance issued during 2018 relating to that legislation. This program will focus on how individual clients can maximize savings for themselves and their families. Tax practitioners will learn how to apply new individual tax planning strategies that clients can use to lower their income tax liability for 2018 and beyond.

Key Topics

- Practical steps individuals can take before the end of 2018 to lower their personal income taxes
- Planning strategies based on the new tax legislation and IRS guidance issued during 2018
- Practical steps businesses and business owners can take before the end of 2018 to lower personal income tax liability

Details

Course Level: Update

IRS Credit Category: Federal tax law update



Upcoming Broadcasts

Business Tax Update and Year-end Planning Strategies

Wednesday, Dec. 12, 2018 (Webinar dates: Dec. 12, Dec. 18)

As 2018 comes to an end, tax practitioners look for new planning strategies based on the recent tax law changes that can help their small and medium-sized business clients and their owners save on taxes. This program focuses on new tax developments that can be employed during 2018 and after to help businesses and business owners reduce their tax liability. Tax professionals will be prepared to discuss new business-related tax developments and planning strategies originating from the new tax legislation enacted at the end of 2017.

Course Level: Update

IRS Credit Category: Federal tax law update

Getting Ready for Tax Season: New IRS Forms and Compliance Requirements

Wednesday, Jan. 16, 2019 (Webinar dates: Jan. 16, Jan. 24)

Part of every tax practitioner's professional life is keeping up with the IRS' yearly update of tax forms, which is especially important now that the IRS will be updating 2018 tax forms based on tax changes produced by the Tax Cuts and Jobs Act. This program will provide tax practitioners with a thorough understanding of new tax form changes and how these changes impact their individual and business clients.

Course Level: Intermediate

IRS Credit Category: Federal tax law

"Thank you for this CPE program and format! Very convenient way to obtain over 30 hours of CPE each year in three-hour increments."

— Previous participant



Registration and Fees

Register for individual courses throughout the season, or save by purchasing multiple courses. Individuals can attend several courses in the series, or firms may divide registrations between attendees and courses in any combination that fits their needs.

Single-course purchase:

Three-hour course	\$ 89 per course
-------------------	------------------

Multiple-course purchases:

Four or more	\$ 80.10 per course	Save 10%
Six or more	\$ 71.20 per course	Save 20%
Eight or more	\$ 57.85 per course	Save 35%

For your convenience, we accept VISA, MasterCard, American Express and Discover.

Online Registration: Visit www.allstartax.com to register.

Advance Preparation: None required, but you may download your course materials as early as two weeks 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 2018–2019 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 www.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 most 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 a sign-in sheet at the Edward Jones branch office or via online attendance checks for webinar attendees. A CPE certificate will be emailed within 10 business days. 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.



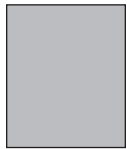
Attorneys: Visit www.allstartax.com to find out if courses are approved for CLE credit in your state.

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)

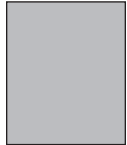


APPROVED
CONTINUING EDUCATION
PROVIDER

The All-Star Tax Series, produced by All-Star Tax Series, LLC and sponsored by Edward Jones, is intended to serve solely as an aid in continuing professional education. The information in the broadcasts and course materials is carefully compiled from sources believed to be reliable, but its accuracy is not guaranteed; information is not appropriate to serve as the sole resource for any tax and accounting opinion or return position and must be supplemented for such purposes with other current authoritative materials. Opinions and positions stated in All-Star Tax Series programs and materials are those of the presenters and/or authors and do not necessarily represent the opinions or positions of Edward Jones. In addition, All-Star Tax Series, LLC and its authors and instructors are not engaged in rendering legal, accounting or other professional services and will not be held liable for any actions or suits based upon the course material or comments made during the broadcasts. If legal advice or other assistance is required, individuals should consult a qualified professional. Reprinted by Edward Jones with permission from All-Star Tax Series, LLC. All rights reserved.



FA1 Name
FA2 Name
FA Title



FA Address
FA Address
FA City, State ZIP
Office 555-555-5555
Toll Free 555-555-5555
Cell 555-555-5555
FA1 email@edwardjones.com
FA2 email@edwardjones.com

PRSRT STD
U.S. POSTAGE
PAID
EDWARD JONES

RETURN SERVICE REQUESTED

6499-0000223

JOHN A. SAMPLES
PUBLINCERIT TERID ACTERCER
ONE AMERICAN EAGLE PLAZA
EARTH CITY, MO 63045-1344



INSIDE: IRA and qualified
plan rollovers and transfers

The All-Star Tax Series

SPONSORED BY

Edward Jones®



Edward Jones is pleased to sponsor this accredited continuing education program for CPAs, EAs and attorneys, conveniently delivered via three-hour broadcasts at participating Edward Jones branch offices. This program, produced by All-Star Tax Series, LLC, features updates on some of the latest tax developments presented by experienced tax, accounting and legal professionals.

Join [me/us] for the next course of the 2018–2019 series:

New Planning Strategies for Retirement Account Rollovers and Transfers

[TIME] Wednesday, Aug. 15, 2018

Register today at www.allstartax.com. FA Number: [FANUMBER]