

# The All-Star Tax Series



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2019-2020 Continuing Education for CPAs, EAs and Attorneys

## Join us for the next course in the series:

### IRAs and Retirement Accounts for Life-changing Events: Marriage, Divorce, Retirement and Death

**Broadcast:** Wednesday, June 5, 2019

**Webinar:** June 5, June 13

Tax practitioners are often challenged when trying to determine which rules apply to IRAs owned by clients who get married, get divorced, retire, attain age 70½ or die. This program summarizes and explains those rules so tax practitioners can understand which IRA rules apply to these life-changing events. Panelists will present the topics simply and provide practical solutions that tax professionals can use in their practices.

## Key Topics

- When an IRA owner can take a distribution without an early distribution penalty – highlighting IRA vs. 401(k) exceptions
- The proper way to split IRAs as part of a divorce settlement
- How to preserve the tax-deferred status of inherited IRAs
- The importance of a designated beneficiary
- Tax-efficient required minimum distribution strategies
- Choosing the right distribution options for a spouse beneficiary

## Panelists

Denise Appleby, CISP, CRC, CRPS, CRSP, APA  
Heather Schreiber, RICP  
Michael J. Tucker, CPA, LL.M. (moderator)

*Panelists are subject to change.*

## Details

**Course Level:** Basic

**CPE and IRS Credits:** Three hours

**IRS Credit Category:** Federal tax law

**CLE Credits:** Approval and credits vary by state; visit [www.allstartax.com](http://www.allstartax.com) for your state's details.

*This course is not approved for CLE in New Mexico.*

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Participate in this course at [my/our] branch office at [TIME] Wednesday, June 5.  
**Register today at [www.allstartax.com](http://www.allstartax.com). FA Number: [FANUMBER]**

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### Praise from previous participants:

“I have attended your tax courses for over 10 years and have always received full value and more.”

“Great program providing excellent resource material for practical solutions and advice to clients!”

## 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.

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### 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:** Approval and credits vary by state; visit **[www.allstartax.com](http://www.allstartax.com)** for your state's details.

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### Contact Information

**Phone:** 610-994-9595

**Email:** [info@allstartax.com](mailto:info@allstartax.com)

**Web:** [www.allstartax.com](http://www.allstartax.com)

# 2019-2020

# Schedule at a Glance

## Featured Broadcast

IRAs and Retirement Accounts for Life-changing Events:  
Marriage, Divorce, Retirement and Death

Wednesday, June 5, 2019 (Webinar dates: June 5, June 13)

(See front cover for details.)

## Upcoming Broadcasts

June 19, 2019	Section 199A: Lessons Learned after the First Filing Season
July 17, 2019	Tax Planning Strategies for Family Groups
Aug. 14, 2019	Guide to the New Accounting Methods for Small and Medium-sized Businesses
Sept. 25, 2019	Social Security and Medicare in 2019: What You Need to Know to Help Your Clients
Oct. 23, 2019	Tax Practitioner's Guide to Buying or Selling a Business
Nov. 6, 2019	Update on Pass-through Entities after Tax Reform: S Corporations, Partnerships and Limited Liability Companies
Nov. 20, 2019	Individual Tax Update and Planning Strategies
Dec. 11, 2019	Business Tax Update and Planning Strategies
Jan. 15, 2020	Getting Ready for Tax Season: New IRS Forms and Compliance Requirements
Dates Still Available:	
May 15, 2019	Loss Limitation Provisions Applicable to Taxpayers Other Than C Corporations (Webinar dates: May 15, May 23)

## The more courses you attend, the more you save!

★ **Season Pass:** Save up to **\$430** by purchasing a Season Pass to attend as many courses as you like throughout the series.

That's up to **11 courses for less than \$50** per course for CPAs, EAs and attorneys!

There are also discounts for purchasing multiple courses.

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

Take advantage of the savings and visit [www.allstartax.com](http://www.allstartax.com) to register today!

(Multiple-course discounts may be used by individuals or firms; the Season Pass is available only to individuals.)

Register today at [www.allstartax.com](http://www.allstartax.com).



## Upcoming Broadcasts

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### Section 199A: Lessons Learned after the First Filing Season

**Wednesday, June 19, 2019** *(Webinar dates: June 19, June 27)*

One of the valuable and statutorily complex benefits the Tax Cuts and Jobs Act provided to taxpayers was Section 199A. This program distills the experiences many tax practitioners had over the last tax season calculating and applying this large deduction for taxpayers. Our experienced panelists will discuss challenges faced and practical strategies to maximize the benefit of the deduction for clients.

**Course Level:** Intermediate

**IRS Credit Category:** Federal tax law

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### Tax Planning Strategies for Family Groups

**Wednesday, July 17, 2019** *(Webinar dates: July 17, July 25)*

The Tax Cuts and Jobs Act made many changes to the Internal Revenue Code that impact families. Tax practitioners must understand and be able to apply these changes to effectively advise their clients. This program summarizes the major changes impacting families and minors. The panelists will discuss planning strategies families can implement to address these changes in the most effective way.

**Course Level:** Basic

**IRS Credit Category:** Federal tax law

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### Guide to the New Accounting Methods for Small and Medium-sized Businesses

**Wednesday, Aug. 14, 2019** *(Webinar dates: Aug. 14, Aug. 22)*

The Tax Cuts and Jobs Act expanded the number of small business taxpayers eligible to use the cash receipts and disbursements method of accounting and exempted these small businesses from certain accounting rules for inventories, cost capitalization and long-term contracts. This program is an in-depth discussion of these issues and many others related to accounting methods after tax reform.

**Course Level:** Intermediate

**IRS Credit Category:** Federal tax law

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## Social Security and Medicare in 2019: What You Need to Know to Help Your Clients

**Wednesday, Sept. 25, 2019** *(Webinar dates: Sept. 25, Oct. 1)*

As clients age, it is common for tax practitioners to field questions regarding Social Security and Medicare. This program provides attendees with a comprehensive understanding of both Social Security and Medicare, and information needed to maximize the benefits of these two programs. The panel includes two of the foremost practitioners and commentators in the United States, Mary Beth Franklin and David Cowan.

**Course Level:** Basic

**IRS Credit Category:** Federal tax law

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## Tax Practitioner's Guide to Buying or Selling a Business

**Wednesday, Oct. 23, 2019** *(Webinar dates: Oct. 23, Oct. 29)*

Buying or selling a business is a complex transaction with many tax variables, such as whether the transaction is an asset sale, a stock sale or an acquisitive reorganization, the types of entities involved as buyer and seller, and whether there are hidden liabilities and/or assets the buyer does not want. This program is an examination of the tax consequences to the buyer and seller of a business, presented by panelists with decades of experience.

**Course Level:** Basic

**IRS Credit Category:** Federal tax law

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## Update on Pass-through Entities after Tax Reform: S Corporations, Partnerships and Limited Liability Companies

**Wednesday, Nov. 6, 2019** *(Webinar dates: Nov. 6, Nov. 14)*

Following the Tax Cuts and Jobs Act, tax practitioners will likely want to understand how pass-through entities interact with important developments such as the limitation on the interest deduction, the new \$250,000/\$500,000 loss limitation, and the Section 199A deduction. This program will discuss these tax reform developments and major issues relating to pass-through entities, such as basis, distributions and liquidations.

**Course Level:** Update

**IRS Credit Category:** Federal tax law update

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## Upcoming Broadcasts

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### Individual Tax Update and Planning Strategies

**Wednesday, Nov. 20, 2019** *(Webinar dates: Nov. 20, Nov. 26)*

The Tax Cuts and Jobs Act has created a new planning environment for individual taxpayers. This program covers tax law changes and IRS pronouncements relating to individuals for 2019, as well as tax planning strategies for individual taxpayers to consider adopting for 2019 and later years. Topics of discussion will include alternative minimum tax credits, charitable contribution deductions, and toggling between the standard deduction and itemized deductions.

**Course Level:** Update

**IRS Credit Category:** Federal tax law update

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### Business Tax Update and Planning Strategies

**Wednesday, Dec. 11, 2019** *(Webinar dates: Dec. 11, Dec. 19)*

The Tax Cuts and Jobs Act changed the planning landscape for businesses. The new law's business-related changes included modifications to depreciation, business interest, the deduction of losses and the Section 199A deduction. This program covers new business tax developments for 2019 and tax planning strategies for business taxpayers to consider adopting for 2019 and beyond.

**Course Level:** Update

**IRS Credit Category:** Federal tax law update

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

**Wednesday, Jan. 15, 2020** *(Webinar dates: Jan. 15, Jan. 23)*

Each year, the IRS makes changes to its forms that tax practitioners must understand in order to prepare tax returns and explain the forms to tax clients. This program covers new IRS tax forms and compliance requirements for 2019.

**Course Level:** Intermediate

**IRS Credit Category:** Federal tax law

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“Excellent course and timely information.  
This CPE format is very convenient, with  
veteran presenters. Thank you!”

— *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.

Season Pass purchase:		
11 courses	\$ 549	Save up to <b>\$430</b>
<i>(Season Pass available to individuals only.)</i>		
Single-course purchase:		
Three-hour course	\$ 89 per course	
Multiple-course purchases:		
Four or five	\$ 80.10 per course	Save <b>10%</b>
Six or seven	\$ 71.20 per course	Save <b>20%</b>
Eight or more	\$ 57.85 per course	Save <b>35%</b>

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

**Online Registration:** Visit [www.allstartax.com](http://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 2019-2020 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](http://www.allstartax.com). To cancel, email [info@allstartax.com](mailto: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 many 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](http://www.nasbaregistry.org).



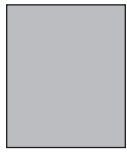
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**Enrolled Agents:** Each All-Star Tax Series course is accepted by the IRS for three credit hours toward annual CE requirements. (IRS-approved CE provider: Surgent McCoy CPE, LLC; provider ID number - QDEJK)

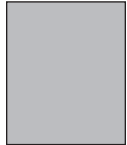


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FA Address  
FA Address  
FA City, State ZIP  
Office 555-555-5555  
Toll Free 555-555-5555  
Cell 555-555-5555  
FA1 email@edwardjones.com  
FA2 email@edwardjones.com

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**INSIDE:** IRA rules  
for major life events

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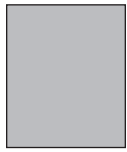
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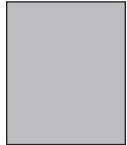
Marriage, Divorce, Retirement and Death

[TIME] Wednesday, June 5, 2019

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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

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