

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:

Individual Tax Update and Planning Strategies

Broadcast: Wednesday, Nov. 20, 2019

Webinar: 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 2020 and beyond. Topics of discussion will include using alternative minimum tax credits, maximizing charitable contribution deductions, and toggling between the standard deduction and itemized deductions.

Key Topics

- Shifting assets to children in light of the new kiddie tax rules
- Alimony planning for 2020 and beyond
- Health insurance issues after repeal of the individual mandate penalty
- Making use of 529 plans to maximize federal and state tax benefits
- Making an 83(i) election to defer tax on stock-based compensation
- Small employer health reimbursement arrangements
- How ABLE accounts work
- Roth conversions after the loss of the recharacterization option

Panelists

Lance G. Weiss, CPA, CVA
Julie A. Welch, CPA, CFP
Jeffrey Jacobs, Esq.
Michael J. Tucker, CPA, LL.M. (moderator)
Panelists are subject to change.

Details

Course Level: Update

CPE and IRS Credits: Three hours

IRS Credit Category: Federal tax law update

CLE Credits: Approval and credits vary by state; visit www.allstartax.com for your state's details.

Participate in this course at [my/our] branch office at [TIME] Wednesday, Nov. 20.
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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 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: Approval and credits vary by state; visit **www.allstartax.com** for your state's details.

Contact Information

Phone: 610-994-9595

Email: info@allstartax.com

Web: www.allstartax.com

NOW WITH NEWS UPDATES!

When changes that may affect your clients occur, you can rely on The All-Star Tax Series to fill you in. The first ten to fifteen minutes of many programs will be devoted to the latest tax news to help keep you and your practice up-to-date!

2019-2020 Schedule at a Glance

Featured Broadcast

Individual Tax Update and Planning Strategies

Wednesday, Nov. 20, 2019

(Webinar dates: Nov. 20, Nov. 26)

(See front cover for details.)

Upcoming Broadcasts

Business Tax Update and Planning Strategies

Dec. 11, 2019

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

Jan. 15, 2020

Dates Still Available

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

Nov. 6, 2019

(Webinar dates: Nov. 6, Nov. 14)

Tax Practitioner's Guide to Buying or Selling a Business

Oct. 23, 2019

(Webinar dates: Oct. 23, Oct. 29)

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
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Multiple-course purchases:

Four or five	\$ 80.10 per course	Save 10%
Six or seven	\$ 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 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. 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 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.



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

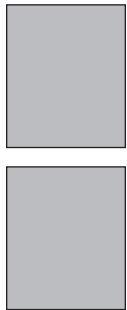
Enrolled Agents: Each All-Star Tax Series course is accepted by the IRS for three credit hours toward annual CE requirements. (IRS-approved CE provider: Surgent McCoy CPE, LLC; provider ID number - QDEJK)



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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

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INSIDE: Tax law changes
and new strategies

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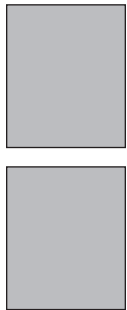
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FA1 Name

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

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INSIDE: Tax law changes
and new strategies

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