

The All-Star Tax Series



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2018–2019 Continuing Education for CPAs, EAs and Attorneys

Join us for the next course in the series:

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

Panelists

Karen Davis, EA
Brian O'Sullivan, CPA
Lance Weiss, CPA, CVA
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: 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, Nov. 28.
Register today at www.allstartax.com. FA Number: [FANUMBER]**

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

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 the Oct. 24, Nov. 7 and Jan. 16 All-Star Tax Series programs will be devoted to the latest tax news to help keep you and your practice up-to-date!

2018-2019 Schedule at a Glance

Featured Broadcast

Individual Tax Update and Year-end Planning Strategies

Wednesday, Nov. 28, 2018

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

(See front cover for details.)



Upcoming Broadcasts

Business Tax Update and Year-end Planning Strategies

Dec. 12, 2018

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

Jan. 16, 2019

Dates Still Available

A Complete Guide to Administering an Estate in Probate

Oct. 24, 2018

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

Maximizing Depreciation and Expense Deductions after Tax Reform

Nov. 7, 2018

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

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.

Program Fees

Single-course purchase:

Three-hour course	\$ 89 per course
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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)



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INSIDE: Tax planning
strategies for individuals

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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.

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