The All-Star Tax Series

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Edward Jones®

2018–2019 Continuing Education for CPAs, EAs and Attorneys

Join us for the next course in the series:

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, even for those with some general experience in probate and estate administration. A variety of challenges face the tax practitioner, attorney and financial advisor team 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 involved
- 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

Panelists

T. Jack Challis, Esq.
William S. Colwell, Esq.
James I. Dougherty, Esq.
Michael J. Tucker, CPA, LL.M. (moderator)

Panelists are subject to change.

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.

Participate in this course at [my/our] branch office at [TIME] Wednesday, Oct. 24.
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

A Complete Guide to Administering an Estate in Probate

Wednesday, Oct. 24, 2018

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

(See front cover for details.)

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

Upcoming Broadcasts

Maximizing Depreciation and Expense Deductions after Tax Reform
Nov. 7, 2018

Individual Tax Update and Year-end Planning Strategies
Nov. 28, 2018

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

Social Security and Medicare Planning in 2018

Broadcast date: Sept. 26
Webinar dates: Sept. 26, Oct. 2

Register today at **www.allstartax.com.**

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

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.

NATIONAL REGISTRY OF CPE SPONSORS

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)

IRS APPROVED CONTINUING EDUCATION PROVIDER

Register today at **www.allstartax.com.**

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Continuing Professional Education
www.edwardjones.com/teamwork

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INSIDE: Challenges in settling an estate

The All-Star Tax Series

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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.

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

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See inside for details.