



WASHINGTON
BANKERS ASSOCIATION

Advanced Tax Return Analysis

March 28, 2014

Seattle, WA

This seminar will provide the banker with an overview of several advanced tax return concepts and related analyses. The session will begin with a brief review of analyzing a business owner's personal "1040" tax return and the return of an S corporation and LLC including analyzing Schedules M-1 and M-2, Schedule K-1, "pass-through" transactions, and other deductions.

The remainder of the seminar will cover pertinent tax topics related to business clients as follows:

Course Objectives:

- Corporate Tax Issues including Business Structure, Section 179 Depreciation, and Bonus Depreciation
- Real Estate Issues including Rentals and Home Offices
- Investments including Capital Gain Issues and Passive Activities
- Employer Provided Benefits including "Qualified Retirement Plans" and Health Savings Accounts (HSAs)
- Retirement Planning Strategies including "Defined Benefit" Plans
- Estate Planning Issues including Gift Taxes
- Recent changes to the Tax Code that impact Business Owners

Audience:

Commercial lenders, credit analysts, loan documentation specialists, branch managers, private bankers, and business development officers

About the Instructor

David Osburn is the founder and managing member of Osburn & Associates LLC. His background includes over 27 years in banking, finance, and marketing. His bank commercial lending credentials include comprehensive loan underwriting, management, customer development, and loan work-out experience

Date/Time:

March 28, 2014

Cost:

WBA/OBA Members: \$325, \$375 after March 14

Non-Members: \$650, \$750 after March 14

Location:

Washington Bankers Association
1601 Fifth Avenue, Suite 1120, Seattle, WA 98101

Registrant Information *(copy for more than one registrant)*

Name _____ Title _____

Company _____

Address _____ City/ST/Zip _____

Email _____ Phone _____

Payment Information

Please charge my credit card Check is enclosed

Card Number _____ Exp Date _____

Billing Address _____ City/ST/Zip _____

Name on Card _____ Signature _____

Please Send Invoice to Attention of: _____

Make check out and send registration information to:
Washington Bankers Association, 1601 Fifth Avenue, Suite 1120, Seattle, WA 98101.
Call us at (206) 447-1700. Fax your registration to (206) 223-6453.

Cancellation Policy: For all cancellations that occur up to seven days prior to the start date, a \$50 cancellation fee will be charged. For cancellations with less than seven days notice, there will be no refunds. A substitute can attend at no fee. For cancelled courses and/or seminars, full fees will be refunded. Cancellation Procedure: Cancellations must be sent in writing to the WBA office via email, fax, or mail. No refunds will be granted until a written cancellation request is received by WBA.