Advanced Tax Return Analysis

July 26, 2018 • WBA, Seattle, WA

This seminar will provide the banker with several advanced tax return concepts and related analyses to help them more effectively work with their business customers.

The session will begin with a brief review of analyzing a business owner's personal "1040" tax return and the return of an LLC, S corporation, and C corporation including Schedules M-1 and M-2, Schedule K-1, pass-through transactions, and other deductions.

About the Instructor

David Osburn is the founder and managing member of Osburn & Associates LLC. His background includes over 30 years in banking, finance, and marketing.

His bank commercial lending credentials include comprehensive loan underwriting, management, customer development, and loan work-out experience.

Course Objectives

- Corporate Tax Issues including Business Structure, Section 179 Depreciation, and Bonus Depreciation
- Investments including Capital Gain/Loss Issues and Passive Activities
- Real Estate Issues including Rentals and Home Offices
- Employer Provided Benefits including "Qualified Retirement Plans" and Health Savings Accounts (HSAs)
- Retirement Planning Strategies including "Defined Benefit" Plans & Captive Insurance
- Estate Planning Issues including Gift Taxes
- Year-End Tax Strategies
- Recent Changes to the Tax Code that impact Business Owners including the "Tax Cuts and Jobs Act" (TCJA)

Who Should Attend

This course is best suited for commercial lenders, credit analysts, loan documentation specialists, branch managers, private bankers and business development officers.

Registration Form

Name ______________________________

Title ______________________________

Bank/Firm ______________________________

Work Address ______________________________

City/State/Zip ______________________________

Phone ______________________________

Email ______________________________

Enclosed is a check for $ ______________________________
or
VISA/Mastercard # ______________________________

Expiration Date ______________________________

Name on Card ______________________________

Billing Contact Name ______________________________

Billing Contact Email ____________________ Phone ____________

Send registration information to:
registration@wabankers.com | WBA, 1601 Fifth Avenue, Suite 2150, Seattle, WA 98101 | Call us at (206) 447-1700.

Schedule

The seminar will run from 9 a.m. to 4 p.m. on July 26.

There will be a break for lunch.

Registration Cost

WBA Members: $345 or $395 after July 12

Register for this session and Advanced Tax Return Analysis on July 26 and receive 15% off.

WBA Washington Bankers Association

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.