Basic Personal & Business Tax Return Analysis

July 12, 2018 • WBA, Seattle, WA

Attend this proactive seminar and gain an understanding of the often complex and confusing topic of taxes.

Bank personnel are required to obtain and properly interpret tax returns for both commercial and consumer lending purposes.

The first part of this seminar will concentrate on personal tax return analysis while the second part will focus on the analysis of various business tax returns.

Who Should Attend

This course is best suited for commercial lenders, credit analysts, relationship managers, 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 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

- Review the basic structure of the personal 1040 federal tax return (including the various schedules and K-1 forms)
- Use analysis forms to prepare a personal cash flow from information gleaned from the 1040
- Discuss updates in the current tax code and how they affect the bank's clients
- Use the tax return to better market the bank's products and services
- Discuss the structure of a C corporation, S corporation, and Partnership (including LLC) tax return
- Analyze business tax returns and prepare cash flows for these entities
- Draw additional information from the business returns including assessment of the company's risk factors
- Discuss updates in the current tax code as they apply to businesses

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 12 at the WBA office in Seattle.

There will be a break for lunch.

There will be no homework required for this seminar.

Registration Cost

WBA/OBA Members: $345 or $395 after June 28

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.