

Minnesota Association of Public Accountants Best of Tax Planning & Retirement Ideas for Individuals

June 3, 2024

8am – 4pm

Webinar

Course Information: Give the very best tax advice to your individual and small business clients with TaxSpeaker’s newly updated planning guide! This course is designed to guide practitioners through dozens of old and new planning concepts and equip you with tools to help clients through unusual income years, long-term guidance for small businesses and high or low-income individuals. This rare instruction allows optimal tax and retirement planning rather than mere tax compliance. Whether you are a seasoned accountant looking for professional development or new to the tax preparation business, our instructors meet you where you are to fully benefit your clients, as well as yourself. We’ve included key updates from 2023 and 2024 Congressional and IRS changes, too! Overall, this course comprises three sub-topics: planning ideas for the W-2 taxpayer, planning for the small business owner, and planning for everyone. Each unit includes 15-30 planning tools, checklists, and example guidance illustrating the rules and tools needed to utilize the idea presented.

Course Objective: Designed to review old rules and explain new rules, this course covers the gamut of current and future tax planning moves for W-2 employees and retirees; estate and gift planning and business owners; good years, bad years and future years; taxpayers and heirs. Complete with pages of checklists, over 50 immediately useful ideas and deductions, this course is guaranteed to provide the student with ideas, clearly defined compliance guidelines, written clear examples, and practitioner oriented implementation steps.

Date	June 3, 2024	Credits	8
Time	8am – 4pm	IRS Program No:	Pending
Location	Webinar	Field of Study	Taxes
Speakers	TaxSpeaker	Prerequisites	None
Early Registration	May 27, 2024	Course Level	Intermediate
Member Fees:	Early - \$300 After 5/27/2024 - \$325	Non-Member Fees:	Early - \$360 After 5/27/2024 - \$385

Attendee Information:

Attendee Name:	Circle One: CPA EA RAP Other (please specify)
Firm Name:	PTIN:
Mailing Address:	
City:	State: Zip:
Email:	Daytime Phone:

Payment Information:

Payment must accompany registration. Registration fee is based upon the date payment is postmarked or received, or the date of online payment. If paying by credit card, all fields are required. Registration is valid for only one attendee. If more than one attendee is participating in a webinar, they must be registered separately.

Enclosed is \$ _____ in payment of this seminar payable to “MAPA”	
Please Charge (circle one): Visa MasterCard AMX Discover	
Card #:	Security Code: Exp Date:
Cardholder Name:	
Billing Address <small>(if different from above)</small>	
City	State: Zip:
Cardholder Signature:	

Please note that the MAPA office cannot accept card payment information transmitted by email due to PCI Compliance standards. Cancellation: The registration fee less a \$30 administrative charge can be refunded up to 10 business days before the seminar. An 80% refund can be obtained with written notice of cancellation between 5 and 10 business days prior to the program. No refund for cancellation less than 5 workdays prior, or for no-shows. Space cannot be guaranteed for walk-in or day-of registrations. Registrations are transferable one time only to another offering except as noted.

Please register early. Mail with Payment to: PO Box 301, Big Lake, MN 55309 • Fax: 763-263-8020 • Phone: 612-366-1983