

# The All-Star Tax Series



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Edward Jones®

2017-2018 Continuing Education for CPAs, EAs and Attorneys

**Join us for the next course in the series:**

## Retirement-related Tax and Financial Planning Topics Tax Advisors Should Know

Wednesday, June 21, 2017

*Webinar replays include June 29, July 11, July 18*

This program addresses Social Security, Medicare and many other important retirement topics. Mary Beth Franklin, a popular national speaker, and David Cowan, who advises thousands of individuals annually, will discuss Social Security and Medicare. Elder-care attorney Erin Merkle will join them to discuss other key retirement topics, including reverse mortgages, long-term care insurance, end-of-life care and special needs trusts.

### Key Topics

- When and how individuals and couples should begin to take Social Security retirement benefits
- Maximizing Social Security benefits for individuals, married couples, divorced couples and surviving spouses
- The ins and outs of Medicare
- Evaluating health insurance coverage options when eligible for Medicare
- When buying long-term care insurance makes sense
- Pros and cons of reverse mortgages
- Legal issues relating to end-of-life care

### Panelists

David L. Cowan  
Mary Beth Franklin, CFP  
Erin D. Merkle, Esq.  
Michael J. Tucker, JD, CPA (moderator)

*Panelists are subject to change.*

### Details

**Course Level:** Basic

**CPE and IRS Credits:** Three hours

**IRS Credit Category:** Federal tax law

**CLE Credits:** Subject to state variations; visit [www.allstartax.com](http://www.allstartax.com) for your state's details.

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**Participate in this course at [my/our] branch office at [TIME] Wednesday, June 21.  
Register today at [www.allstartax.com](http://www.allstartax.com). FA Number: [FANUMBER]**

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### Previous participants speak up:

“In 25 years of tax preparation as a CPA, I have never had this information so readily available in one course.”

“Examples and application of rules, principles and laws were clear and helpful.”

## 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.

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### 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](http://www.allstartax.com)** for your state's details.

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### Contact Information

**Phone:** 610-994-9595

**Email:** [info@allstartax.com](mailto:info@allstartax.com)

**Web:** [www.allstartax.com](http://www.allstartax.com)

# 2017-2018

# Schedule at a Glance

## Featured Broadcast

Retirement-related Tax and Financial Planning Topics  
Tax Advisors Should Know

Wednesday, June 21, 2017

*(See front cover for details.)*



## Upcoming Broadcasts

July 12, 2017	Key Tax Principles and Strategies Applicable to Pass-through Entities
Aug. 9, 2017	What Tax Practitioners Should Know about Required Minimum Distributions from IRAs and Qualified Plans
Sept. 27, 2017	Employment Law Update for Tax Practitioners
Oct. 18, 2017	Exit Strategies for Clients Selling or Passing on a Business to the Next Generation
Nov. 1, 2017	Individual and Business Tax Planning Strategies to Implement before Year-end
Nov. 15, 2017	Individual Tax Update
Dec. 6, 2017	Tax Update for Small and Medium-sized Businesses and Their Owners
Jan. 10, 2018	Getting Ready for Busy Season: New IRS Forms and Compliance Requirements

Seats may still be available for:

June 7, 2017	Dealing with the IRS When a Client Gets Audited
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## The more courses you attend, the more you save!

★ **Season Pass:** Save up to **\$430** by purchasing a Season Pass to attend as many courses as you like throughout the series.  
That's up to **11 courses for less than \$50** per course for CPAs, EAs and attorneys!

There are also discounts for purchasing multiple courses.

- ★ **Single course:** just **\$89**
- ★ **Four or more:** save **10%**
- ★ **Six or more:** save **20%**
- ★ **Eight or more:** save **35%**

Take advantage of the savings and visit [www.allstartax.com](http://www.allstartax.com) to register today!

*(Multiple-course discounts may be used by individuals or firms; the Season Pass is available only to individuals.)*

Register today at [www.allstartax.com](http://www.allstartax.com).



### Key Tax Principles and Strategies Applicable to Pass-through Entities

Wednesday, July 12, 2017 *(Webinar replays include July 20, July 26, Aug. 1)*

Many clients do business as either S corporations or multiple-member limited liability companies treated as partnerships for federal tax purposes. This program will focus on advanced partnership or S corporation tax rules that general practitioners are likely to encounter as they advise clients subject to such rules, as well as any 2017 tax law changes impacting pass-through entities.

**Course Level:** Intermediate

**IRS Credit Category:** Federal tax law

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### What Tax Practitioners Should Know about Required Minimum Distributions from IRAs and Qualified Plans

Wednesday, Aug. 9, 2017 *(Webinar replays include Aug. 17, Sept. 7, Sept. 19)*

Tax professionals often advise clients about required minimum distributions (RMDs) from IRAs and qualified plans. This program includes a comprehensive discussion of all aspects of RMDs from IRAs and qualified plans, including RMDs to account owners and to designated and non-designated beneficiaries.

**Course Level:** Intermediate

**IRS Credit Category:** Federal tax law

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### Employment Law Update for Tax Practitioners

Wednesday, Sept. 27, 2017 *(Webinar replays include Oct. 5, Oct. 19, Oct. 25)*

This program focuses on workplace regulation issues commonly encountered by small and medium-sized business owners. The program provides critical information so business owners and their financial advisors can be constantly alert to circumstances that might precipitate employee lawsuits and complaints to regulatory agencies.

**Course Level:** Basic

**IRS Credit Category:** Federal tax law

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## Exit Strategies for Clients Selling or Passing on a Business to the Next Generation

Wednesday, Oct. 18, 2017 *(Webinar replays include Oct. 26, Nov. 2, Nov. 8)*

A business exit strategy may consist of selling equity in the business to a third-party buyer but could also involve selling some or all of the business's assets, liquidating the entity and distributing the business assets to the owners, or reorganizing with another entity in an "acquisitive reorganization." This program reviews common exit strategies, associated tax consequences and any relevant 2017 tax law changes.

**Course Level:** Intermediate

**IRS Credit Category:** Federal tax law

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## Individual and Business Tax Planning Strategies to Implement before Year-end

Wednesday, Nov. 1, 2017 *(Webinar replays include Nov. 9, Nov. 14, Nov. 30)*

Individuals and business owners expect their tax advisors to be up-to-date with the latest tax reduction strategies so they will not be burdened with unnecessary income taxes. This program reviews new and proven techniques that practitioners can use to help individual and business clients lower income tax liability, as well as addressing the impact of any tax law changes for 2017.

**Course Level:** Intermediate

**IRS Credit Category:** Federal tax law

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## Individual Tax Update

Wednesday, Nov. 15, 2017 *(Webinar replays include Nov. 21, Nov. 29, Dec. 7)*

As another tax season approaches, each tax practitioner needs to know the new legislative, regulatory and case law changes that impact individual taxpayers in 2017 and 2018. This program will update practitioners to help them be prepared to discuss new tax developments with individual tax clients and implement appropriate planning strategies on their behalf.

**Course Level:** Update

**IRS Credit Category:** Federal tax law update

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## Upcoming Broadcasts

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### Tax Update for Small and Medium-sized Businesses and Their Owners

Wednesday, Dec. 6, 2017 *(Webinar replays include Dec. 14, Dec. 19, Dec. 28)*

As 2017 comes to an end, tax practitioners look for new developments that can help their small and medium-sized business clients. This program focuses on business-related tax developments that can be employed to help businesses and business owners reduce their tax liability for 2017. The course will update practitioners to help them discuss and implement these new tax-reduction strategies.

**Course Level:** Update

**IRS Credit Category:** Federal tax law update

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### Getting Ready for Busy Season: New IRS Forms and Compliance Requirements

Wednesday, Jan. 10, 2018 *(Webinar replays include Jan. 16, Jan. 23, Jan. 25)*

Getting ready for busy season involves knowing the new tax rules for 2017 and also how those new rules impact IRS tax forms for 2017. This course provides tax return preparers with an up-to-date review of important new tax forms, IRS revisions to tax forms reflecting 2017 developments, and tax form filing issues and deadlines.

**Course Level:** Intermediate

**IRS Credit Category:** Federal tax law

“Very relevant materials and will become a reference source for me.”

“The class at my advisor’s office was informative, and all said it was one of the best they had attended.”

— *Previous participants*

## 2017-2018 Registration

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

Season Pass purchase:		
11 courses	\$ 549	Save up to <b>\$430</b>
<i>(Season Pass available to individuals only.)</i>		
Single-course purchase:		
Three-hour course	\$ 89 per course	
Multiple-course purchases:		
Four or more	\$ 80.10 per course	Save <b>10%</b>
Six or more	\$ 71.20 per course	Save <b>20%</b>
Eight or more	\$ 57.85 per course	Save <b>35%</b>

For your convenience, we accept VISA, MasterCard, American Express and Discover.

**Online Registration:** Visit [www.allstartax.com](http://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 2017-2018 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 cancel or transfer your registration, email [info@allstartax.com](mailto: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, and 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.nasbregistry.org](http://www.nasbregistry.org).



**Attorneys:** Visit [www.allstartax.com](http://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)



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**INSIDE:** Retirement  
planning, Social Security  
and Medicare

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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.

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**Tax Advisors Should Know**

**[TIME] Wednesday, June 21, 2017**

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