

Spidell's 2020 Post-Tax Season Update and Review

AB 5, SECURE Act, and an update of tax season issues, problems, and more

8 hours plus 1-hour optional lunch session

Seminar Price
\$249*
~~\$279~~

- **Do a deep dive into AB 5, including:**
 - When can you, and how do you, treat a worker as an independent contractor for federal and an employee for California?
 - Compare federal and California independent contractor rules
 - Uncover recent court cases, including the ones filed by truckers and freelance photographers
- **Prepare for new planning strategies under the SECURE Act and see:**
 - New strategies for postponing RMDs
 - Why the '49ers are the lucky ones
 - If stretch IRAs are dead
- **Use §529 plan funds to pay student loans**
- **Look at the extenders and decide which clients should amend returns**
- **Clue in on what else happened during tax season and what you should do about it**

Live Webinar:**
May 27–28 (Wednesday–Thursday)
(2 days: 8:30 a.m. to Noon PT)

On-Demand Webinar:**
Available by June 4, 2020

City	Day	Date	Location
San Diego	Monday	May 11, 2020	Scottish Rite Event Center
Garden Grove	Tuesday	May 12, 2020	Great Wolf Lodge
Burbank	Wednesday	May 13, 2020	Pickwick Gardens Conference Center
Sacramento	Tuesday	May 19, 2020	Crowne Plaza Sacramento Northeast
San Jose	Wednesday	May 20, 2020	DoubleTree by Hilton San Jose
So. San Francisco	Thursday	May 21, 2020	South San Francisco Conference Center

Designation	CPE Hours
CPAs and CFPs***	Up to 9 Tax
EAs	Up to 9 Federal Tax
CRTPs (CTEC)	Up to 9 Federal Tax
Attorney	Up to 7.5 General MCLE

**Optional lunch topic discussion not included in the live and on-demand webinar versions of this course. Webinar attendees will receive up to 8 hours of CPE.

***CFPs do not receive credit for the webinar or self-study versions of this course.



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This course has been designed to meet the requirements of the IRS Return Preparer Office; including sections 10.6 and 10.9 of Department of Treasury's Circular No. 230 (Provider No. CRA7E); the California State Board of Accountancy; the California Bar Association; the Certified Financial Planner Board of Standards, and the California Tax Education Council. This does not constitute an endorsement by these groups. The State Boards of Accountancy have final authority on the acceptance of individual courses for CPE credit. For more information regarding administrative policies such as complaints or refunds, contact Spidell Publishing at 714-776-7850. Spidell Publishing, Inc. has been approved by the California Tax Education Council to offer continuing education courses that count as credit towards the annual "continuing education" requirement imposed by the State of California for CTEC Registered Tax Preparers. A listing of additional requirements to renew tax preparer registration may be obtained by contacting CTEC at P.O. Box 2890, Sacramento, CA 95812-2890, or by phone at 877-850-2832, or on the internet at www.CTEC.org.

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*Discount valid through April 30, 2020.

Additional \$25 fee for registration at the door for all seminars. Please use a separate form for each person registering. Seminar includes continental breakfast, lunch, and parking at all locations.

Seminar Cancellation Policy: \$50 cancellation fee if you cancel fewer than seven (7) days before any seminar. Request refunds by May 31, 2020, or save the \$50 fee and convert the seminar into self-study.

Webinar Cancellation Policy: No refunds will be given after noon on the day before the webinar.

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We need your professional license/registration number(s) for continuing education credit.		
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