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Spidell's 2021/22 Federal and California Tax Update

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Attend Spidell's Tax Update and be ready for tax season

2021 has proved to be a giant challenge: another stimulus bill, the ARP Act, and California's SALT workaround that affects both federal and California returns. Plus, AB 80 and AB 150 issues will continue to haunt us. To help make your tax season a little less stressful, this year Spidell's 2021/22 Federal and California Tax Update will:

- Focus on the challenges and changes for 2021 returns, including possible big federal changes
- Help your clients with ERC, EIP and PPP cleanup, including:
  - Fixing IRS's Letter 6470's — oh, what a mess
  - Getting refunds by filing amended returns to claim ERC and paid leave credits
- Explain the how and why of filing superseding returns (your new best friend)
- Provide you with client letters, worksheets, and charts, so you can engage your customers with explanations of changes and planning opportunities
- Get the straight scoop on AB 150, AB 80, and more

Plus, get these important takeaways:

- Properly compute basis for PPP forgiveness in 2020 and 2021
- Make sure your Schedule C clients took advantage of their COVID-19–related benefits
- Prepare for IRS audits of IRC §199A deductions
- Review NOLs:
  - Can you still carry back losses that you carried forward in prior years?
  - How do you compute the carryover to 2021?
- Review whether your client should repay their COVID-19 IRA or pension distribution
- Beware of companies selling fraudulent tax credits — it's one of the IRS's Dirty Dozen
- Attend in November or December and use tax planning strategies based on new laws and proposed changes for the future and consider whether to:
  - Accelerate income/deductions
  - Take capital gains before year-end
- Consider opportunity zone funds for 2021 capital gains — after 2021 the benefits are not as good

California is even more important this year

- Prepare to make SALT workaround (AB 150) payments prior to December 31
  - See who can, can't, should, and shouldn't make the election
  - Find out how to make the election
  - Clarify how a SMLLC fits into the SALT workaround regime
  - Consider the AMT consequences of making the election
  - Consider taking the SALT workaround election in alternating years
- Review the AB 80 rules, especially for multistate taxpayers
- Be ready for even more nonconformity
- See if there's a way around the California AGI haircut for deductions
- Prepare for EDD's AB 5 audits
- What is going on with the 2021 1099-NEC?

Your Presenters

Get the most up-to-date facts and analysis presented by our experienced tax pros, who'll be ready to answer your questions in real-time.

Lynn Freer, EA

Renée Rodda, J.D.

Mike Giangrande, J.D., LL.M.

Tim Hilger, CPA

Alan Pinck, EA

We look forward to "seeing" you there!

UPDATE: Print book now included!

Allow seven business days to receive the book before the webinar.

Want more than 8 hours of CPE?

Sign up now and add our "2021/22 Bonus CPE: Federal Tax Review" online self-study for only ~~$89~~ $69 and get an additional 8 hours of CPE!**

2021/22 FEDERAL AND CALIFORNIA TAX UPDATE

Live Webinars

AM Sessions (8:30 a.m. to Noon PT)	**PM Sessions** (1:30 p.m. to 5:00 p.m. PT)
SOLD OUT ~~November 22 & 23 (Mon. & Tue.)~~	SOLD OUT ~~November 22 & 23 (Mon. & Tue.)~~
SOLD OUT ~~November 29 & 30 (Mon. & Tue.)~~	
SOLD OUT ~~December 1 & 2 (Wed. & Thu.)~~	SOLD OUT ~~December 1 & 2 (Wed. & Thu.)~~
SOLD OUT ~~December 7 & 8 (Tue. & Wed.)~~	**December 7 & 8 (Tue. & Wed.)**
December 9 & 10 (Thu. & Fri.)	**December 9 & 10 (Thu. & Fri.)**
December 14 & 15 (Tue. & Wed.)	**December 14 & 15 (Tue. & Wed.)**
December 16 & 17 (Thu. & Fri.)	**December 16 & 17 (Thu. & Fri.)**
December 20 & 21 (Mon. & Tue.)	**December 20 & 21 (Mon. & Tue.)**
SOLD OUT ~~January 4 & 5 (Tue. & Wed.)~~	**January 4 & 5 (Tue. & Wed.)**
SOLD OUT ~~January 12 & 13 (Wed. & Thu.)~~	**January 12 & 13 (Wed. & Thu.)**
January 17 & 18 (Mon. & Tue.)	**January 17 & 18 (Mon. & Tue.)**
January 27 & 28 (Thu. & Fri.)	**January 27 & 28 (Thu. & Fri.)**
On-Demand Webinar	**Self-Study (online and print)**
Available by Tuesday, November 30	**Available by Wednesday, December 1**

The 2021/22 Federal and California Tax Update is designed to meet the requirements for 8 hours of continuing education for CPAs and CFPs†; 6 hours of Federal Update for EAs††; 6 hours of Federal Update and 2 CA for CRTPs; and 6.75 hours of General MCLE/Tax Specialization credit for attorneys.

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

††EAs will receive a 2-hour federal tax self-study to ensure up to 8 hours of CPE.

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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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2021/22 Federal and California Tax Update ... **$259**

Live Webinar‡ $259

- ☐ **December 7 & 8** *(Tuesday–Wednesday) 1:30 p.m.–5:00 p.m. PT*
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- ☐ **January 12 & 13** *(Wednesday–Thursday) 1:30 p.m.–5:00 p.m. PT*
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- ☐ **January 27 & 28** *(Thursday–Friday) 8:30 a.m.–Noon PT*
- ☐ **January 27 & 28** *(Thursday–Friday) 1:30 p.m.–5:00 p.m. PT*

Not sure when you want to attend? *Reserve a place now and change it later if you need to. See Spidell's flexible refund policy.*

☐ **On-Demand Webinar‡ $259**
Available by November 30, 2021

☐ **Self-Study** (Available by December 1, 2021)
☐ **Online $259** ☐ **Print $287.07** *(includes tax and shipping)*

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‡Printed manual will be mailed to live and on-demand webinar attendees seven business days before the webinar. We cannot guarantee timely delivery, but you will also receive a PDF version before the webinar. You must have computer speakers to listen to the webinars.

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