

Tax Planning for Individuals: A Review & Update Self-Study Webinar (10 Hours)

ST07621A
ST076

Self Study Webcast
Jan 21

Overview:

Explore the full gamut of tax provisions, regulations, rulings and court cases affecting current year tax preparation and subsequent years' tax planning for individuals. In this targeted self-study program, you will:

- Learn about the tax impacts of recent legislative actions, including the Tax Cuts and Jobs Act of 2017, Secure Act of 2019 and the Extenders Act of 2019
- Receive an update on pending tax legislation and other developments
- Gain practical knowledge of how to fill out tax forms related to all the issues discussed

Objective:

To provide tax professionals with an update on important legislative, regulatory and judicial actions impacting individual taxpayers. You'll finish with a thorough understanding of the current laws, regulations and a host of planning strategies to help you and your clients minimize tax exposure now and in the future.

[Detailed Learning Objectives](#) [1]

Emphasis:

- How the Tax Acts of 2017 and 2019 will impact individual tax returns now and in the future
- Tax rate changes
- Individual tax brackets
- Standard deductions
- Itemized deductions
- Mortgage and other interest expense
- Capital gains
- Carried interest
- Adjustments to income
- Income exclusions
- Child Tax Credit and Kiddie Tax
- Health insurance and 529 plans
- 199A Qualified Business Deduction
- Estates, gift tax and GST
- Residential rental property
- Sale of a principal residence
- Update on Passive Loss Rules
- Retirement plans
- Stock options
- Alternative minimum tax



Preparation:

No advance preparation required.

Level of Knowledge:

No advance preparation required.



[NASBA & State Sponsor Information](#) | [Policies](#)

Source URL:

<https://www.cpeonline.com/selfstudycourse/webcast/tax-planning-for-individuals--a-review--and--update-self-study-webinar-%2810-hours%29-2>

Links:

[1] [https://www.cpeonline.com/JavaScript:showObjectivesPopup\(\);](https://www.cpeonline.com/JavaScript:showObjectivesPopup();)