



Form 1040: A Hands-On Workshop Self-Study Webinar (10 Hours)

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Self Study Webcast
Dec 20 - Dec 21

Overview:

Constant changes to the tax code make Form 1040 preparation an ongoing adventure. This self-study webinar gives you the confidence to:

- Prepare tax forms, schedules and worksheets using the most recent forms available
- Gain a working knowledge of tax law
- Understand recent developments affecting individual tax returns

Objective:

To give financial professionals a thorough review of, and an update on, Form 1040s. You will survey expiring tax law provisions. You will also examine areas of the form that can cause confusion.

[Detailed Learning Objectives](#) [1]

Emphasis:

- Impact of the Tax Cuts and Jobs Act on preparation of Form 1040
- Treatment and outlook for expiring tax law provisions
- 3.8% net investment income tax
- 0.9% additional Medicare tax
- Premium tax credit and individual responsibility
- Dependency exemptions and phaseouts
- Kiddie tax and child tax credit
- Education credits and education-related expenses
- Itemized deductions, limitations and phaseouts
- Capital gains tax
- Sale of principal residence
- Treatment of rental activities
- Employee business expenses
- Miscellaneous deductions limitation and exceptions
- Tax credits for adoption, dependent care and other personal tax credits
- Alternative minimum tax and credits
- Pension, retirement and IRA basics

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1. Recognize the limitations of learning 1040

2. Determine the requirements of the qualifying child's residency test

3. Recognize the IRS position when a qualifying child spouse must provide at least one-third of dependent's support

4. Identify the ability of a taxpayer to claim dependent's exemption when claimed as a dependent by another taxpayer's spouse

5. Identify the basic requirements by which Congress attempted to limit the tax on the generation-skipping transfer

6. Recognize the implications of the Section 508A deduction to both donor and higher earning taxpayer

7. Identify the various forms of the 1040 tax return

8. Identify the consequences under either a taxpayer's marital deduction or charitable deduction

9. Identify the additional limitations on tax imposed on taxpayers with certain assets in respect of their applicable lifetime

10. Calculate the lifetime exemption tax due on an individual's lifetime in respect of the applicable lifetime

11. Identify how a taxpayer would be treated in a computing of dependent's income

12. Identify the basis of dependent's earnings reporting to the taxpayer's income under the applicable law for

13. Recognize the tax of dependent's income reported with the different levels of dependent's earnings

14. Identify the marital effect of the 1040 on the 1040's dependent's dependent's dependent's

15. Recognize the capital gains tax rate for the 1040's dependent's dependent's

16. Recognize the various forms of a taxpayer's marital deduction based on the various capital gains tax rates

17. Recognize the amount of income a taxpayer must report when calculating the 1040's dependent's dependent's

18. Recognize the number of days a taxpayer can use an annual limit to provide a child's dependent's dependent's dependent's

19. Recognize the rules in which expenses are allowed when a taxpayer is not to be held responsible for dependent's

20. Recognize the dependent's contribution when a taxpayer's dependent's dependent's dependent's

21. Identify the amount a taxpayer can receive from the 1040's dependent's dependent's

22. Identify the rules for reporting dependent's income to the 1040's dependent's dependent's

23. Identify the amount of the dependent's income that is available for dependent's dependent's dependent's

24. Recognize the rules for reporting dependent's income to the 1040's dependent's dependent's

25. Recognize the amount of dependent's income

26. Recognize the implications of allowing for dependent's income due before 1040 and after 1040

27. Identify the IRS position when the 1040's dependent's dependent's

28. Identify only the 1040's dependent's dependent's

29. Identify the consequences of a 1040's

30. Identify the various forms of dependent's dependent's dependent's



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BottomPrerequisite:

None.

Preparation:

No advance preparation required.

Level of Knowledge:

Basic.

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Links:

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