



BASIC PERSONAL & BUSINESS TAX RETURN ANALYSIS

**VIRTUAL SEMINAR
JANUARY 22, 2021**

Attend this virtual seminar and gain an understanding of the often complex and confusing topic of **TAXES!**

Bank personnel are required to obtain and properly interpret tax returns for both commercial and consumer lending purposes. The first part of this virtual seminar will concentrate on personal tax return analysis while the second part will focus on the analysis of various business tax returns.

THE OBJECTIVES OF THE FIRST PART CONSIST OF THE FOLLOWING:

- Review the basic structure of the personal 1040 federal tax return (including the various schedules and K-1 forms),
- Use analysis techniques to prepare a personal cash flow from information gleaned from the 1040 and the related schedules,
- Discuss recent changes in the tax code including the “Tax Cuts and Jobs Act” (TCJA) and how they affect the bank’s clients, and
- Describe how the 1040 tax return can be used to market the bank’s products and services.

THE SECOND PART INCLUDES:

- Discuss the structure of a C corporation, S corporation, and Partnership (including LLC) tax return,
- Analyze business tax returns and prepare cash flows for these entities,
- Draw additional information from the business returns including identifying fraudulent tax returns,
- Discuss updates in the tax code including the TCJA as they apply to businesses.

About the Instructor



David L. Osburn, MBA, CCRA, is the founder of Osburn & Associates, LLC, a Business Training and Contract CFO Firm. His extensive professional background of over 30 years includes work as a Business Trainer/ Contract CFO and work as a bank commercial lender including the position of Vice President/Senior Banking Officer. His banking credentials include loan underwriting, loan work-out, management, and business development.

Mr. Osburn holds the professional designation of Certified Credit & Risk Analyst (CCRA) as granted by the National Association of Credit Management (NACM).

WHEN

January 22, 2021
9:00 a.m. - 3:00 p.m.

WHERE

Comfort of your desk – One connection for your bank means training opportunities for multiple employees.

WHO SHOULD ATTEND

Commercial lenders, credit analysts, consumer lenders, loan documentation specialists, branch managers, assistant branch managers, private bankers, and business development officers



COVID-19 UPDATE

The ABA takes the health and safety of members seriously. Given the impact of the coronavirus pandemic, ABA is offering this session as a virtual course. We appreciate your understanding and flexibility, and we look forward to bringing you a great virtual seminar.



Arkansas Bankers Association | Professional Development Department

1220 West Third Street | Little Rock, Arkansas 72201 | (501) 376-3741 | www.arkbankers.org

REGISTRATION FEES

ABA Members:

Early Registration Price: \$340; After December 25: \$390

Non-Members:

Early Registration Price: \$680; After December 25: \$780

CANCELLATION

Full registration fees will be refunded if a cancellation is received before January 8. No refunds will be given for cancellations made after January 8. All cancellations must be submitted in written format prior to the event.

VIRTUAL LIVE FORMAT

Attendees will need Internet access and a standard web browser to join this video and web conferencing. They will receive an email with a link to join the virtual meeting, handouts, and any additional information a few days before the event.

You do not need your own Zoom account. You will use the link, meeting ID and password we provide.

- You can log in on a desktop computer, laptop or download the Zoom app on your smart device.
- Internet access
- Audio on computer or a phone line

CONTINUING EDUCATION



Attendants qualify for 6 Continuing Professional Education (CPE) credits in Specialized Knowledge in group-live training (presented online due to COVID-19). Prerequisites: Basic knowledge of bank lending and credit practices. Program level: Basic - Intermediate. No advance preparation is required. CPE will be granted to registered attendees upon request. The Arkansas Bankers Association 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 submitted to the National Registry of CPE Sponsors through its website: www.nasba.org.

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JANUARY 22, 2021

Bank/Company Name _____ Phone _____

Registrant Name _____ Title _____ E-mail _____

Registrant Name _____ Title _____ E-mail _____

Address _____ City _____ State _____ Zip _____

Registration Contact _____ Phone _____ E-mail _____

PAYMENT INFORMATION

Charge my: Mastercard  Visa  American Express  Discover 

Account Number _____

Name on Card _____

Expiration Date _____ CSC Number _____

(3-digit security code on back of your card)

If you would prefer to give us your credit card information over the phone, please call the ABA Professional Development Department at (501) 376-3741. Please do not email credit card information.

Note: Non-Members must pay with credit card or check prior to the event.

Email: kami.coleman@arkbankers.org

Fax: (501) 376-9243

Mail: **Check Payable to:**
Arkansas Bankers Association
Professional Development Department
1220 West Third Street
Little Rock, AR 72201

ABA USE ONLY:

Registered: _____

Amount: _____

Received: _____