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*See page 10 for details.

Quickfinder®
Catalog for Tax Preparers
Featuring Quickfinder, PPC®, and Checkpoint Learning®
Planning in Advance to Optimize Tax Results

The Tax Cuts and Jobs Act (TCJA) significantly altered the individual and business tax landscape. And it undoubtedly impacted your clients’ 2018 tax returns. But how many tax dollars did your clients save thanks to the TCJA changes — perhaps less than they had hoped for?

Now that tax season is behind you it’s time to address potential tax saving opportunities you may have noted when preparing your clients’ 2018 returns. And it’s time to identify and implement more tax planning ideas that may fit your clients in 2019. Quickfinder can help you ensure your clients keep their 2019 tax bills as low as the TCJA allows.

**Tax Planning**

There are a number of opportunities to assist clients with tax planning in 2019. The increased standard deduction, elimination of exemptions, reductions in itemized deductions, and lower rates will impact 2019 taxes, as they did in 2018.

- At a minimum, clients will need to ensure that their 2019 withholding or ES payments reflect their 2018 tax result and anticipated 2019 changes.
- Clients whose 2018 itemized deductions did not exceed the increased standard deduction should consider bunching itemized deductions into every other year, so they exceed the standard deduction during those years.

But there is a lot more that can be done to take advantage of the TCJA. That’s where thoughtful planning to optimize 2019 tax results will serve your clients well.

**Qualified Business Income Deduction**

One of the biggest challenges on many 2018 returns was understanding and complying with the qualified business income (QBI) deduction. There are likely opportunities to save your clients tax dollars by optimizing their QBI deductions.

For taxpayers with taxable income that exceeds the 2019 taxable income lower threshold limits on the QBI deduction ($321,400 for MFJ; $160,700 for Single and HOH; $160,725 for MFS), reducing taxable income may increase the allowable QBI deduction. This may be particularly effective for specified service businesses that would otherwise have the QBI deduction completely phased-out.

Strategies to consider include:
- Contributing to an employer retirement plan.
- Making deductible IRA contributions.
- Contributing to a health savings account (HSA).
- Deferring business income or accelerating business expenses.
- Using donor-advised funds to bunch charitable donations into one tax year.
- Increasing W-2 wages paid by converting contract workers to employees.
- Segregating service and non-service businesses into separate entities.
- Aggregating businesses if combined amounts for the QBI deduction produce a more favorable outcome.
- Converting a sole proprietorship to an S corporation.

Each client’s QBI deduction situation is unique and includes an analysis involving all aspects of the deduction — taxable income, QBI, W-2 wages, etc. Planning to optimize the QBI deduction usually involves considering various “what-if” scenarios, and projecting their tax outcomes. To assist you with these projections, the Tax Planning for Individuals Quickfinder Handbook includes a QBI deduction worksheet, and several examples that show you how to apply QBI-optimizing strategies. And for a better understanding of the QBI deduction calculations, the Handbook provides a step-by-step analysis and a flowchart.
Additional Tax Planning Opportunities

Following are other tax planning opportunities to consider in 2019:

- Planning a family’s tax situation to utilize children’s “tax capacity” — recognizing enough income on their returns to take full advantage of standard deductions and 0% tax rates for qualified dividends and long-term capital gains.
- Using investments that minimize the “kiddie tax,” such as municipal and US savings bonds, and both growth-oriented and qualified dividend-generating stocks.
- Structuring investments to take advantage of tax-favored Section 1244 stock, Qualified Small Business Stock, and Qualified Opportunity Funds.
- Periodically reviewing a client’s investment portfolio to see if it includes unrealized gains or losses that would be tax-beneficial to recognize — especially if losses can be recognized to offset higher-taxed short-term gains.
- Developing an effective plan to fund college costs by considering available tax incentives and the college financial aid system.
- Planning for tax-optimal divorce agreements in light of the TCJA changes to the tax treatment of alimony.
- Advising clients effectively on the many options for tax-favored retirement funding. And for older clients, starting to plan for upcoming required minimum distributions.

For further explanation of these and hundreds more concise actionable tax planning strategies, we offer the Tax Planning for Individuals Quickfinder Handbook — see page 13 for information on this Handbook. In addition, reviewing a taxpayer’s 2018 Form 1040 can help tax professionals identify possible tax-saving ideas. The Tax Planning for Individuals Quickfinder Handbook includes a Roadmap to Individual Tax Savings that helps you use information included on a client’s 2018 1040 to identify specific tax-saving ideas for 2019 and beyond. The Handbook also includes Client Handouts that you can use to provide your clients more information on selected tax topics.

Navigating the 2020 Tax Season

While most of the TCJA provisions were first effective for the 2018 tax year, regulations, such as those for business interest expense limitations and qualified business income (QBI) deductions, and IRS guidance and forms (for example, an official IRS form — not just a worksheet — for calculating the QBI deduction in 2019), continue to be issued that will impact 2019 returns. And additional legislative tax changes are always a possibility when Congress is in session (such as “extenders” and disaster relief provisions that are enacted periodically, but sometimes unpredictably). So, the 2020 tax season will present many challenges.

To help you prepare for a prosperous, efficient tax season, and to provide you the trusted tax quick reference solutions you need through tax season and beyond, we offer the 1040 Quickfinder Handbook and Small Business Quickfinder Handbook — see page 6 for information on these Handbooks.

Staying on Top of Developments Throughout the Year

Nothing is constant in the tax world, except for complexity and change. The TCJA enacted hundreds of new tax provisions, many of which are still generating additional guidance and clarification — meaning more law changes for technical corrections and many more IRS releases are forthcoming. So, while staying on top of tax developments will be challenging, we stand ready to sift through the hundreds of news items and consult with leading experts to identify developments you really need to know about so you can concentrate on helping clients.

For concise, easy-to-understand monthly coverage of the latest essential tax developments in the year ahead, we offer the Quickfinder Tax Tips Newsletter — see page 15 for information on this product.

Quickfinder has you covered — all year round.
Check your IRS Response Library

IRS notices continue to be on the rise as the IRS shifts to enhance the taxpayer experience through the creation of online accounts where taxpayers can independently resolve their issues.

If a client receives a notice, they are likely to turn to you as their trusted advisor for guidance.

With the Thomson Reuters Checkpoint™ IRS Response Library, you can simply search by notice number or topic to respond to the IRS and your clients using a variety of tax resolution tools. These tools include scripts, response documents, and practice aids. In addition, you can confidently generate a step-by-step work plan so that you can project billable hours and resolve the issue efficiently and effectively. The Library includes expanded coverage of penalties, including first-time penalty abatement and taxpayer advocate services.

It also provides practical guidance for efficiently handling individual, business, and payroll post-filing issues and effectively dealing with the IRS in many types of engagements.

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Federal Tax Regulations, Summer Edition

Speed your research with two comprehensive topic indexes, and get a complete picture on Federal Tax Regulatory topics since Proposed and Final Regulations under the same Code Section are published together. Editorially added cautions provide you with key information about special rules and effective dates needed to properly apply the Regulation.

You’ll receive the critical information you need to easily get answers to your questions with:

- Editorial value-adds, including Effective Date Cautions and Special Rules Cautions
- Deep Cite Running heads and Detailed Topical Running heads to aid your research
- Complete Final and Temporary Regulation Topic Index — more than 10,000 entries to help you find your answer
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- Preambles for all current Notices of Proposed Rulemaking
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Complete Internal Revenue Code, Summer Edition

This convenient, easy-to-use volume provides you with the complete legislative history and a comprehensive topic index to speed your tax research. Cautions from our editorial experts provide you with key information about special rules and effective dates needed to properly apply the Code Section. RIA’s Complete Internal Revenue Code includes all legislative changes up to its publication date, providing you with a complete history of all amendments affecting a Code Section.

RIA’s Complete Internal Revenue Code provides quick access to the information you need with:

- Complete history reflecting all substantive and technical amendments back to the Codification of the 1954 Code
- Effective Date Cautions and Special Rules Cautions to ensure you have all the precise information at your fingertips
- Deep Cite Running heads and Detailed Topical Running heads to aid your research
- Complete Topic Index with more than 22,500 entries to help you get to your answer quickly

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Available August 2019.

Call for pricing on higher quantities.

“...You should consider this product if you interact with the IRS frequently, as there are many useful checklists, specimen letters, and engagement letters. I especially liked their penalty abatement template.”

— Sole Practitioner, Redmond, OR

Visit tax.tr.com/irsresponse for a product demo and additional information.
Quickfinder Tax Preparation Handbooks

Authored by experienced tax professionals, Quickfinder Tax Preparation Handbooks provide accurate, quick-read answers to all of your tax questions.

These Handbooks offer:

- Material that’s organized in a unique tab structure based on the IRS tax forms and schedules
- Numerous quick-reference tables and charts with the answers you need
- Examples that illustrate how the tax rules apply and how to report items on the return
- A “What’s New” tab that summarizes significant current-year tax changes that are addressed throughout the Handbook so you can quickly get up to speed on what’s changed
- References throughout the Handbook to relevant Internal Revenue Code sections, IRS regulations and rulings, and court cases so you can dig deeper into a subject, if needed

Premium Quickfinder Handbook

The Premium Quickfinder Handbook is your trusted source for quick reference to tax principles that apply when preparing individual, business, and fiduciary income, estate and gift, tax-exempt organization, and payroll tax returns. It covers the essentials of preparing these tax filings, including detailed, true-to-life examples with filled-in forms and line-by-line explanations. It also addresses tax law changes and IRS developments — all in a concise, easy-to-use format.

Whether you’re simply looking up an amount or rate, want to determine how the tax rules apply to a transaction or event, or find out how to report a particular tax item on the return, the Handbook gets you the accurate answers you need quickly.

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Available December 2019. Pre-order early for the greatest savings.

“Excellent quick-reference resource. I have used a Premium Quickfinder Handbook for several tax seasons. It’s easy to find the information I am looking for. I tried a competitor’s product once, and that’s when I truly found how easy Quickfinder is to use. I don’t plan on ever using anything else.”

— Sole Practitioner, Newport, TN
The 1040 Quickfinder Handbook is your trusted source for quick reference to tax principles that apply when preparing individual income tax returns. It covers all aspects of preparing a Form 1040, including tax law changes and IRS developments, and is presented in an easy-to-use format.

With the 1040 Quickfinder Handbook, you’ll be on top of the ever-changing tax rules that apply to your individual client returns. Whether you’re simply looking up an amount or rate, want to determine how the tax rules apply to a transaction or event, or need to know how to report a particular tax item on the return, the Handbook gets you the accurate answers you need quickly.

### 1040 Quickfinder Handbook

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The Small Business Quickfinder Handbook is your trusted source for quick reference to tax principles that apply when preparing business and fiduciary income, estate and gift, tax-exempt organization, and payroll tax returns. It covers the essentials of preparing these tax filings — including detailed, true-to-life examples with filled-in forms and line-by-line explanations — and thoroughly addresses tax law changes and IRS developments, all in a concise, easy-to-use format.

From start-up to termination issues and everything in between, the Handbook is a unique, one-stop solution for your many tax questions.

### Small Business Quickfinder Handbook

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### COMPARING PREMIUM, 1040, AND SMALL BUSINESS QF HANDBOOKS

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Individuals — Special Tax Situations
Quickfinder Handbook

In addition to the general tax rules that apply to all individuals, some individuals are subject to special tax rules that apply to them because of their occupation, investments, or life events. As a tax preparer, you’ll likely encounter these types of clients, so it’s important to have a tax resource specifically designed to answer the questions you’ll face when preparing their returns.

The Individuals — Special Tax Situations Quickfinder Handbook will save you time and money on those uncommon tax issues you’ll encounter when preparing individual returns. It covers more than 30 types of unique taxpayers.

The Handbook includes:

• A Quick Tax Briefing in each tab that provides an at-a-glance summary of the key tax rules and relevant IRS materials
• Key terms and definitions you need to know about each type
• Filing requirements for specific types of taxpayers
• Time-saving tips, observations, cautions, strategies, and other preparation alerts
• Real-life examples to help you apply the rules to client situations
• Quick-reference tables and charts

With over 30 unique situations involving people from authors to daycare providers, bankrupt individuals to executives, military members to teachers, the Individuals — Special Tax Situations Quickfinder Handbook is the perfect companion to the 1040 Quickfinder Handbook.

Visit our eStore for a complete listing of special situations covered.

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Preorder early for the greatest savings.

“Great resource for quick information! This book was recommended to us, and now I couldn’t imagine preparing taxes without it. Whenever there is a new tax situation to understand, Quickfinder is my go-to resource. It always has the answer — without having to sift through pages and pages of tax code.”

— Individual Tax Preparer, Pueblo, CO
Depreciation Quickfinder Handbook

The Depreciation Quickfinder Handbook is your trusted source for quick-reference solutions to help you determine the right recovery period, compute the right amount of depreciation, decide whether expenses need to be capitalized, manage the special rules for autos and other listed property, claim the Section 179 and bonus depreciation deductions, correct depreciation errors, work with like-kind exchanges and involuntary conversions, and simplify a host of other complex tax issues. It provides quick answers to your business property questions in a concise, easy-to-use format.

For tax professionals who need more information on business property issues, this Handbook is the perfect companion to the widely relied-upon 1040 and Small Business Quickfinder Handbooks. It concisely explains how to handle business property issues on tax returns and how to plan business property transactions for optimal tax results.

The Handbook gets you the accurate answers you need quickly with:

- Breadth of quick-reference tables and charts that make it easy to find what you are looking for without having to read through pages and pages of text, including easy-to-read depreciation tables for MACRS (with or without bonus depreciation), ADS, AMT, and ACRS
- A new law tab that summarizes significant current-year tax changes that are addressed throughout the Handbook so you can quickly get up to speed on what’s changed and what to watch out for when preparing current-year returns
- Coverage of property dispositions, including tricky tax rules for installment sales, like-kind exchanges, and depreciation recapture

Quickfinder Tax Tables

Quickfinder Tax Tables are durable, laminated fold-out tools that provide the Quickfinder tables and charts you use most often, allowing you to quickly answer client questions without flipping through pages. Keep important tax facts and figures at your fingertips with Quickfinder Tax Tables.

Quickfinder Tax Tables are easy to take with you wherever you go, so you’ll never be without key tax information at your fingertips.

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Available December 2019.
Pre-order early for the greatest savings.


California is a complex state, but you’ll be able to navigate all of the complicated details easily with the California Tax Handbook. This handy annual reference guide provides a roundup of the year’s major legislation and other changes, including changes in IRC conformity. It includes practical charts and tables, current-year tax tables, extensive references to the revenue and tax code, and easy-to-read coverage of all California taxes.

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Call for pricing on higher quantities.

“"My go-to depreciation reference. It’s quick, easy, and has concise information. I like the quick charts on the front and more detail within the pages if needed.”
— Accounting Firm Owner, Jacksonville, TX

Pre-order early for the greatest savings.
PPC’s 1040 Deskbook

PPC’s 1040 Deskbook provides detailed, easy-to-understand, and affordable tax return-focused guidance, complete with real-life examples and illustrations of completed forms. Owners and/or staff can quickly and easily resolve the key issues encountered when preparing individual tax returns. The Deskbook provides workflow guidance, tools, and other practice aids that will save time, help ensure returns are accurately prepared, and enable owners and/or staff to identify potential tax-planning opportunities for clients.

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“Our firm has used the PPC Deskbook series for over 10 years. It is a very practical, easy-to-use guide that is the go-to resource for our team. Checkpoint provides links from this resource to primary sources and further explanatory materials, making it an easy first stop for compliance-related questions.”

— Accounting Firm Partner, Washington, D.C.

PPC’s 1065 Deskbook

Partnerships will be a top priority for the Small Business/Self-Employed (SB/SE) Division of the IRS, according to the SB/SE Commissioner. With the key issues, examples, filled-in Schedule K-1s and other forms, checklists, worksheets, and other quality-control tools you’ll find in PPC’s 1065 Deskbook, you and your staff can solve the difficult or unclear issues encountered when preparing Form 1065. The Deskbook points out elections and other tax-saving opportunities while preparing the return. The tax-planning road map highlights planning opportunities that you and your staff can pursue after busy season.

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PPC’s 1120S Deskbook

Given the renewed interest of the IRS in examining pass-through returns and emphasis on practitioner due diligence, proper preparation of your clients’ returns is more important than ever. With the key issues, examples, filled-in Schedule K-1s and other forms, checklists, worksheets, and other quality-control tools in PPC’s 1120S Deskbook, you and your staff can solve the difficult or unclear issues encountered when preparing Form 1120S and Schedule K-1. The Deskbook points out elections and other tax-saving opportunities while preparing the return. The road map highlights planning opportunities that you and your staff can pursue after busy season.

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“I am relatively new to this area, having been on the audit side of a CPA firm for years. This product is an excellent tool, covering every aspect of S corps. It is saving me an enormous amount of time and is making me aware of many topics that I was not aware of. It is well worth the rather modest price.”

— Accounting Firm Advisor, Missouri

PPC’s 1120 Deskbook

Given the emphasis of the IRS on practitioner due diligence, proper preparation of your clients’ returns is more important than ever. With the key issues, examples tied to filled-in forms, checklists, worksheets, and other quality-control tools you’ll find in PPC’s 1120 Deskbook, you and your staff can solve the difficult, unclear, or misunderstood issues encountered when preparing Form 1120. The Deskbook points out elections and other tax-saving opportunities while preparing the return. The tax-planning road map highlights planning opportunities that you and your staff can pursue after busy season.

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Health care reform has had a significant impact on individuals and employers. The employer mandate to provide insurance coverage; the individual mandate to obtain coverage, credits, and subsidies to help individuals purchase coverage; exchanges for acquiring coverage; reporting requirements; and taxes are just some of the many changes that are impacting your clients. They are likely to have questions, and we’ve got answers. Our Health Care Reform Quickfinder Handbook makes it easy for you to quickly locate answers to help your clients stay in compliance.

Topics covered in the Handbook include:

- Health insurance mandate for individuals, including the reduction of the penalty made by the Tax Cuts and Jobs Act
- Obtaining insurance through a state marketplace
- Premium tax credit reporting and reconciling
- Health insurance mandate for employers
- Penalty for not providing insurance to employees and guidance on responding to IRS penalty notices
- Small employers eligible for SHOP participation
- Small employer health insurance credit
- Other taxes and fees
- Notice and reporting requirements

Available December 2019. Pre-order early for the greatest savings.

“Health Care Reform Quickfinder Handbook provides a good overview as well as detailed information on the health care reform law. It covers the important points in an organized manner better than some of the seminars I have attended.”
— Sole Practitioner, IL

“Excellent resource for understanding the Affordable Care Act as it relates to mandated health insurance coverage beginning in 2014 and also the 3.8% N-II tax and 0.9% Medicare tax on earned income.”
— V. Mixon, The Woodlands, TX

PPC’s Guide to Health Care Reform

Stay current on the latest changes and new guidance

The Affordable Care Act and recent health care reform legislation has significantly altered the landscape for obtaining and providing health care benefits. PPC’s Guide to Health Care Reform provides practical, easy-to-understand guidance on the key provisions of the many legislative changes in the last several years. You can use this Guide to keep yourself up to date with the latest guidance that has been issued. This will enable you to help your clients stay in compliance and avoid or minimize penalties and other costs brought on by health care reform.

Topics covered include:

- The mandate requiring employers to provide affordable health insurance coverage to full-time employees and their dependents or pay a penalty, including guidance on responding to IRS penalty notices
- The mandate requiring individuals to have minimal health insurance coverage and the reduction of the penalty by the Tax Cuts and Jobs Act
- The premium tax credit and cost-sharing reduction subsidy available to help individuals pay for coverage, including line-by-line guidance on completing Form 8962, calculating the premium tax credit, and reconciling advance payments of the credit to the actual credit allowed
- Numerous notice and reporting requirements placed on employers, plans, plan sponsors, and insurers
- Market reform provisions affecting health care plans and the benefits they provide, including required coverage for employees’ adult children to age 26, prohibition on annual and lifetime limits and preexisting condition exclusions, cost-sharing limits, expanded coverage of preventive services, maximum waiting periods, and specific rules for grandfathered plans
- Coverage of the small employer health insurance credit available to help eligible small employers offset the cost of providing insurance to employees

You’ll also get real-life examples, worksheets, completed forms, quick-reference charts of implementation dates, and client letters. The Checkpoint subscription also includes a newsletter that alerts you to new developments as they occur.

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Tax Planning for Individuals
Quickfinder Handbook

Income, estate, and gift tax planning for individuals

Tax rules change from year to year and sometimes drastically. Whether it’s simply rates and amounts or the addition or expiration of new tax provisions, keeping ahead of clients is a challenge for any tax practitioner. And many clients expect more from their tax practitioner than just preparing their tax returns. They want their practitioner to alert them to tax-saving ideas or simply be ready when they call with questions throughout the year.

The Tax Planning for Individuals Quickfinder Handbook provides quick answers to a broad range of individual tax-planning topics. Unlike other tax-planning publications, this Handbook presents the material using Quickfinder’s unique quick-reference format with charts, tables, and examples, plus plain-language descriptions of tax-saving strategies.

With the Handbook, you’ll get:

• A broad range of tax-planning ideas sure to reduce your individual clients’ federal tax burdens
• Numerous tables and charts with the most current information and amounts to help you quickly answer questions and determine which strategies apply to your clients
• A variety of real-life examples

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IRA and Retirement Plan Quickfinder Handbook

The tax rules for IRAs and retirement plans can be confusing, often differing from plan to plan with important amounts changing from year to year. The IRA and Retirement Plan Quickfinder Handbook provides quick answers to questions involving eligibility, making contributions, limits on contributions and elective deferrals, covering employees, how distributions are taxed and when they are required, penalties, and selecting beneficiaries — just to name a few.

Whether encountering questions when preparing returns or advising a client on his or her retirement plan options, this Handbook will provide you with the answers you need in a quick-access, easy-to-read format. Additionally, you’ll have all the different IRA and retirement plan amounts right at your fingertips.

With this Handbook, you’ll get:

- The ins and outs of traditional and Roth IRAs with numerous examples to illustrate the key features
- The similarities and differences between SEPs, SIMPLE-IRAs, solo 401(k)s, and other small business retirement plans, including key factors to consider when choosing a plan
- What you need to know about how distributions are taxed, how beneficiaries can impact payouts, and what’s required for a tax-free rollover
- Quick answers without having to search through multiple publications or websites

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**Quickfinder Tax Tips Newsletter**

The Quickfinder Tax Tips Newsletter is a monthly newsletter from the trusted source you rely on for fast, accurate tax and financial planning information — and it also includes continuing guidance on TCJA provisions. Each month, the Newsletter brings you concise, easy-to-understand coverage of the latest essential tax developments, including tax law changes, IRS releases, and court decisions, plus timely tax-planning strategies that you can use to guide your clients. The Newsletter also includes a monthly calendar of important tax due dates.

Here’s a quick summary of what you’ll get:

- Briefings of important tax developments, so you’re always in the know
- Essential tax update and law change information presented in easy-to-grasp Quickfinder tables
- Tax planning tips sure to save you time and your clients’ tax dollars
- Key IRS releases, court cases, and law change summaries to make sure you’re not caught off guard
- A monthly tax calendar to keep you abreast of upcoming due dates

The Quickfinder Tax Tips Newsletter is a monthly newsletter from the trusted source you rely on for fast, accurate tax and financial planning information, including continuing guidance on TCJA provisions.

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**PPC’s Practitioners Tax Action Bulletins**

PPC’s Practitioners Tax Action Bulletins® (PTAB), issued twice monthly, goes beyond a traditional newsletter to provide tax professionals with practical, action-oriented guidance. It doesn’t just report the tax news, it tells you what it means for you and your clients and what you need to do about it.

With PPC’s Practitioners Tax Action Bulletins, you will:

- **Save time.** We sift through hundreds of news items and consult with leading experts to identify topics you really need to know about. You’ll get a quick-read summary of current developments, plus detailed, in-depth practical guidance when needed. We’ll tell you which clients are affected, what they need to do about it, and then give you the tools you need to do it.

- **Increase profitability.** PTAB’s action-oriented guidance helps to generate more business by not only telling you what has changed in the federal tax world but also explaining how the changes impact your clients and your practice. With our new “client communication” practice aid, you can send helpful tables or other visual elements to clients, which will facilitate discussions and help generate consulting engagements.

- **Reduce stress and uncertainties.** PTAB is written and reviewed by experienced tax practitioners. We’ll continue to provide guidance on the Tax Cuts and Jobs Act (TCJA), which should provide clarity and reduce stress as you apply the new law to your clients’ situations.

- **Let clients know you’re watching out for them.** When something happens that clients need to know, you’ll get a sample letter or other communication to send them. Plus, each annual subscription includes a mid-year and end-of-year planning letter, along with a client survey. Better yet, you can download these letters as Word documents that are ready to use in your practice.

- **Work more efficiently.** PTAB includes handy summary tables and checklists to save time on engagements. Plus, with Checkpoint delivery, you can instantly link to cited source materials (if included in another subscription), and search PTAB with other Checkpoint publications you own.

- **Ensure a quality work product.** In addition to covering the latest changes in the tax rules, you’ll get annual return preparation checklists. You’ll also receive help with hard-to-understand tax issues and traps for the unwary.

- **Take advantage of our extensive archive of back issues.** Checkpoint’s powerful search capabilities put every issue back to January 1, 2007, right at your fingertips.

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Designed to provide quick and easy access to critical tax questions, the Federal Tax Handbook offers comprehensive, insightful guidance on federal tax law, including the latest regulations, rulings, and revenue procedures as well as precise explanations about changes that could impact your business or your clients.

You’ll get specific guidance on key tax topics, including individual, trust, partnership and corporate taxation, deductions, credits, capital gains, IRAs, SIMPLE and pension plans, education incentives, passive activity losses, the Code Sec. 199A “pass-through” deduction for qualified business income, employee benefits, estate and gift taxes, and more. And, you’ll be able to quickly navigate any tax questions that arise with:

- Detailed coverage of the latest tax legislation
- A tax calendar
- Income tax rates, current estate, gift and excise tax rates, and Social Security tax thresholds
- Advice on which forms to use to report transactions
- Depreciation and inclusion amount tables
- Extensive professional guidance from our expert editorial team

Find trusted answers in the Federal Tax Handbook.

Available in print and eBook formats, this extensive resource offers premier guidance on federal tax law to ensure you always have immediate access to the answers you need.

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PPC’s Guide to Dealing with the IRS

Unlike other publications that repeat the rules, PPC’s Guide to Dealing with the IRS shows you how to apply the rules for your clients’ benefit with more than 150 tools and practice aids that enable you and your staff to work efficiently and effectively with the IRS. You’ll get step-by-step guidance for more than 50 matters, work programs for major engagements, checklists for preparing forms, and summaries of the law. There’s also a chapter on managing client matters and another chapter on profiling typical client situations, including strategies, filled-in forms, and other practice aids for completing the engagement.

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PPC’s Guide to Compilation and Review Engagements

Compilation and review engagements require comprehensive, up-to-date reference resources to help you ensure compliance with the latest accounting standards. PPC’s Guide to Compilation and Review Engagements contains hundreds of practice aids, sample reports, sample disclosures, and financial statements to help you perform your engagements correctly and with maximum efficiency.

Dozens of timesaving tools ensure you’ll stay in compliance with professional standards and peer review requirements, reducing your risk of noncompliance. You’ll be able to address nearly every situation you might encounter in a review or compilation engagement and have critical information and tools at hand.

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1040 Income Tax Preparation

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FOR: ALL TAX PROFESSIONALS, INCLUDING CPA, EA, CTEC

This course focuses on the preparation of individual tax returns and utilizes a key issue approach in covering topics ranging from filing status to exemptions, income and adjustments, personal deductions, tax calculations, and tax planning opportunities.

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### Magic Week Individual Seminars

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Optional courses available for additional cost.

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