



Quickfinder[®] Catalog

Summer 2021

Featuring Quickfinder, PPC[®], and Checkpoint[®] Learning

Tax planning under changing tax laws

Tax legislation is becoming a constant. The December 2020 Consolidated Appropriations Act (CAA, 2021) includes the Taxpayer Certainty and Disaster Tax Relief Act of 2020 (TCDFRA), and other tax acts, which add or extend many favorable tax provisions. This article will highlight several of the favorable provisions available in 2021.

Quickfinder provides concise tables summarizing key provisions of these tax acts on the Handbook Updates page of our website: tax.thomsonreuters.com/quickfinder.

Tax changes worth planning for in 2021

There are many tax changes that impact planning in 2021. Following are some key provisions that may benefit your clients.

- A forgiven debt generally gives rise to taxable cancellation of debt (COD) income. However, an exception applies to COD income from cancelled mortgage debt that was used to acquire a principal residence. Under the exception, up to \$750,000 (\$375,000 for married individuals filing separately — MFS) of COD income from principal residence acquisition debt that is cancelled in 2021–2025 is excluded from income.
- The 2020 CARES Act provided tax-free treatment for payments made by employer-sponsored educational assistance plans towards student loan debts of participating employees. Between 3/28/20 and 12/31/20, up to \$5,250 per employee could be received tax free, and employers could deduct the payments. This tax break has been extended through 2025.
- Taxpayers may generally deduct the ordinary and necessary food and beverage expenses associated with operating a trade or business, including meals consumed by employees on work travel. The deduction is generally limited to 50% of the otherwise allowable amount. There are exceptions to the 50% limit, but there was no exception for meals provided by a restaurant. Under the TCDFRA, the 50% limit will not apply to expenses for food or beverages provided by a restaurant that are paid or incurred after 2020 and before 2023. The use of the word “by” (rather than “in”) a restaurant makes it clear that the new exception is not limited to meals eaten on the restaurant’s premises. Takeout and delivery meals provided by a restaurant are also fully deductible.
- Before 2020, individuals could not claim an itemized charitable deduction for cash contributions that exceeded 60% of adjusted gross income (AGI). The 2020 CARES Act suspended the AGI limit for qualifying charitable contributions made in 2020, so 100% of these contributions could be deducted. The suspension of the AGI limit has been extended through 2021.
- For 2020, individuals who don’t itemize deductions can deduct up to \$300 of cash charitable contributions. The same \$300 limit applies to both unmarried taxpayers and married couples filing jointly (MFJ). The \$300 deduction has been extended to 2021, and increased to \$600 for MFJ.
- The 2017 Tax Cuts and Jobs Act (TCJA) set the threshold for itemized medical expense deductions at 7.5% of AGI, with a scheduled increase to 10% of AGI for 2021 and later years. Fortunately, the 7.5% threshold has now been made permanent.
- For 2021 and later years, the tuition and fees deduction is repealed. However, the phase-out rule for the Lifetime Learning credit of up to \$2,000 annually is now aligned with the more favorable phase-out rule for the American Opportunity credit of up to \$2,500 per student. Both education credits will be phased out between modified AGI of \$80,001 and \$90,000 for unmarried individuals, and between \$160,001 and \$180,000 for MFJ. This is a trade-off of the former tuition deduction for the more favorable Lifetime Learning credit phase-out rule.



In addition, the following tried and true tax actions are as important as ever in 2021:

- Tax professionals will need to ensure that their clients' 2021 withholding or ES payments reflect their 2020 tax result and anticipated 2021 changes.
- Clients whose 2020 itemized deductions did not exceed the standard deduction should consider bunching itemized deductions into every other year, so they exceed the standard deduction during those years.

Additional tax planning opportunities to consider in 2021 include the following:

- 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 U.S. 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
- Planning for tax-optimal divorce agreements in light of the TCJA changes to the tax treatment of alimony
- Advising clients on the many options for tax-favored retirement funding — and for clients nearing age 72, planning 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*. This Handbook includes a Roadmap to Individual Tax Savings that helps you use information included on a client's 2020 1040 to identify specific tax-saving ideas for 2021 and beyond. The Handbook also includes Client Handouts that you can use to provide your clients more information on selected tax topics — such as planning for investments, children, education, divorce, charitable contributions, retirement plans, elderly clients, and more.

For all of the facts, figures, and concise explanations you need to advise your clients on the complex tax rules for IRAs and qualified retirement plans, the *IRA and Retirement Plan Quickfinder Handbook* is your top quick reference resource.

See page 12 for more information on these and other *Tax Planning Quickfinder Handbooks*.

Navigating the 2022 tax season

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 *Tax Preparation Quickfinder Handbooks* and additional quick reference resources. See page 5 for information on these Handbooks and resources.

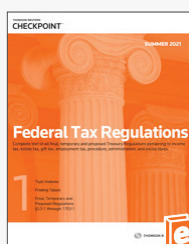
Staying on top of developments throughout the year

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 16 for information on this product.

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Featured products



Product code: RG7P (print)/RG7V2021 (eBook)	
Product qty	Print or eBook price
1	\$296
2 - 4	\$263.20
5 - 10	\$245.30
11 - 25	\$239.90

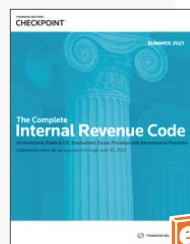
Available August 2021.

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 22,000 entries to help you find your answer
- Complete Proposed Regulation Topic Index — more than 7,000 entries to help you find your answer
- Preambles for all current Notices of Proposed Rulemaking
- Cross-references from Proposed Regulations to Preambles



Product code: IR7P (print)/IR7V2021 (e-Book)	
Product qty	Print or eBook price
1	\$ 203
2 - 4	\$ 183.05
5 - 10	\$ 164.30
11 - 25	\$ 153.90

Available July 2021.

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 20,500 entries to help you get to your answer quickly

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



Product code: QPE	
Print	\$89
eBook	\$85
Three-ring binder print	\$92

Available December 2021.
Pre-order early for greatest savings.

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.



Product code: Q40	
Print	\$65
eBook	\$61
Three-ring binder print	\$68

Available December 2021.
Pre-order early for greatest savings.

1040 Quickfinder Handbook

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.



Product code: QSB	
Print	\$65
eBook	\$61
Three-ring binder print	\$68

Available December 2021.
Pre-order early for greatest savings.

Small Business Quickfinder Handbook

Forms 1065, 1120, 1120S, 1041, 706, 709, and 990

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.

Comparing Premium, 1040, and Small Business Quickfinder Handbooks

Topic	Premium	1040	Small Business
Tax Table, EIC Table	●	●	
State	●	●	
Quickfacts, Worksheets, Where to File	●	●	
Form 1040 Line-by-Line	●	●	
Schedules A and B	●	●	
Schedules C, F, and SE; QBI Deductions	●	●	
Schedule D and Form 4797	●	●	
Schedule E, Passive Activities, At-Risk	●	●	
Form 2106, Business Travel, and Meals	●	●	
Form 4562, Depreciation, Section 179	●	●	
Autos and Listed Property	●	●	
Tax Credits, AMT, NIIT, and Special Taxpayers	●	●	
Children, Education, and Divorce	●	●	
Retirement and Social Security	●	●	
Personal Income Tax Organizer and Deduction Finder®	●	●	
IRS Circular 230	●	●	
Business Reference and Worksheets	●		●
Partnerships (1065)	●		●
C Corporations (1120)	●		●
S Corporations (1120-S)	●		●
Exempt Organizations (990)	●		●
LLCs and Other Business Entities; QBI Deduction	●		●
Fiduciary (1041)	●		●
Estate and Gift (706/709)	●		●
Payroll (940/941)	●		●
Depreciation and Amortization	●		●
Business Deductions and Credits	●		●
What's New	●	●	●
Index	●	●	●
Supplemental Tax Organizers	●		
Estate and Financial Planning		●	
IRS, Penalties, Audits		●	
Employee Benefit Plans			●
Accounting Methods and Principles			●
Starting a New Business			●
Acquisitions, Dispositions, Liquidations			●
Tax Planning			●
Total Pages (approximate)	614	410	364

For a detailed description of each Handbook's contents, visit tax.tr.com/quickfinder



Product code: QST	
Print	\$99
eBook	\$93



Product code: QSS	
Print	\$65
eBook	\$61

Available February 2022.
Pre-order early for greatest savings.

All States Quickfinder Handbook

Get a complete, concise, and consistent summary of instructions for filing out-of-state individual income tax returns with the All States Quickfinder Handbook. The Handbook covers returns for all 50 states and the District of Columbia, presenting topics in a consistent format and making it faster and easier for you to find information for any state.

The Handbook uses clear language and an easy-to-use, tabbed format, allowing you to quickly find the state tax filing information you need:

- What are the new tax developments for this filing year?
- Who is required to file in this state?

Plus, the Handbook includes:

- A summary of state forms for resident, part-year, and nonresident taxpayers
- Information about income, additions, subtractions, deductions, exemptions, and credits
- Tax tables and tax rate schedules, saving you time in finding the correct tax amounts
- Summarized city, county, and school district information
- Worksheets to assist you in correctly calculating amounts to report on the form
- Information on when returns are due, how to obtain extensions, and where and how to file them
- Information on making electronic payments and how to make estimated tax payments

You'll also get easy-to-read charts for state tax rates, deductions and exemptions, Social Security and pension tax treatment, extension information, electronic filing information, conformity to federal bonus depreciation, and Section 179 expense and state resources for identity theft.

Available December 2021.
Pre-order early for greatest savings.

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.



Order online at tax.tr.com/saveqf25



Call +1 800 431 9025 to speak to a sales specialist.

Tax preparation – in-depth guidance



Product code: QDE	
Print	\$65
eBook	\$61

Available November 2021.
Pre-order early for greatest savings.

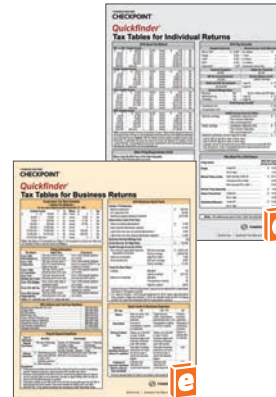
Depreciation Quickfinder Handbook

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



Tax tables for individual returns	
Product code: QLI	
Print	\$18
eBook	\$14

Tax tables for business returns	
Product code: QLB	
Print	\$18
eBook	\$14

Available December 2021.
Pre-order early for greatest savings.

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.



Product code: CTHP	
Print	\$136

California Tax Handbook, 2022 Edition

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. 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.



Product code: TDB/2 volumes
Print | \$405

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.



Product code: T2S/2 volumes
Print | \$405

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 roadmap highlights planning opportunities that you and your staff can pursue after busy season.



Product code: T65/2 volumes
Print | \$405

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 roadmap highlights planning opportunities that you and your staff can pursue after busy season.



Product code: T20/2 volumes
Print | \$405

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 roadmap highlights planning opportunities that you and your staff can pursue after busy season.

Be an industry leader

Make it easy for clients to lean on you year-round

Bundle and save up to 25% off, plus get free shipping on Quickfinder Handbooks.

Build your tax quick-reference library by choosing the Quickfinder Handbooks you and your team need.

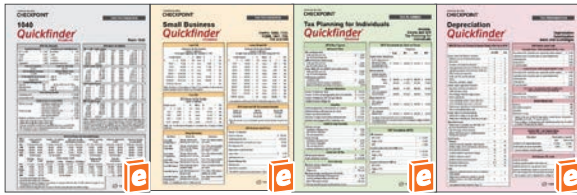
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Free shipping on 3 or more Quickfinder Handbooks through June 30, 2021



* Bundle promotion valid through 11:59 p.m. CST, September 30, 2021 and valid on new orders only. Free shipping applies to three or more products purchased online at tax.tr.com/saveqf25. Free shipping promotion valid through 11:59 p.m. CST, June 30, 2021. Offer may be modified or discontinued at any time without notice. Promotion excludes Checkpoint, RIA, PPC, and Checkpoint Learning CPE.

Customer favorites

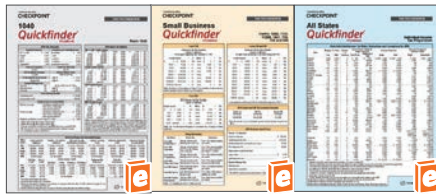


Federal Tax Essential Library

Essential resources for all tax preparers

- 1040 Quickfinder Handbook (Q40), p. 6
- Small Business Quickfinder Handbook (QSB), p. 6
- Tax Planning for Individuals Quickfinder Handbook (QIP), p. 13
- Depreciation Quickfinder Handbook (QDE), p. 8

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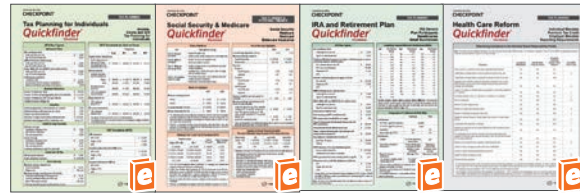


Core Library

Must-have tax preparation resources

- 1040 Quickfinder Handbook (Q40), p. 6
- Small Business Quickfinder Handbook (QSB), p. 6
- All States Quickfinder Handbook (QST), p. 7

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Tax Planning Library

Key tax planning tools to serve your clients

- Tax Planning for Individuals Quickfinder Handbook (QIP), p. 13
- Social Security & Medicare Quickfinder Handbook (QSM), p. 14
- IRA and Retirement Plan Quickfinder Handbook (QIR), p. 14
- Health Care Reform Quickfinder Handbook (QHC), p. 12

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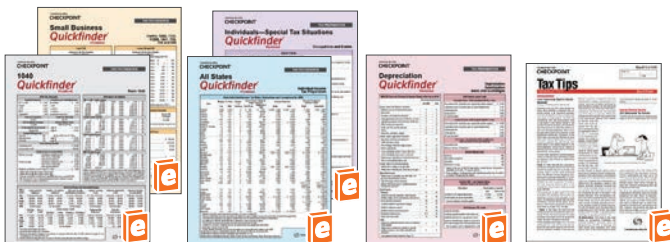


Core Library With Tables

Key resources for federal tax professionals

- 1040 Quickfinder Handbook (Q40), p. 6
- Small Business Quickfinder Handbook (QSB), p. 6
- All States Quickfinder Handbook (QST), p. 7
- Tax Tables for Individuals (QLI), p.8
- Tax Tables for Businesses (QLB), p.8

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Tax Preparation Library

Full suite of tools for tax preparers

- 1040 Quickfinder Handbook (Q40), p. 6
- Small Business Quickfinder Handbook (QSB), p. 6
- All States Quickfinder Handbook (QST), p. 7
- Individuals — Special Tax Situations Quickfinder Handbook (QSS), p. 7
- Depreciation Quickfinder Handbook (QDE), p. 8
- Quickfinder Tax Tips Newsletter (QFTN), p. 16

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Tax planning



Product code: QHC

Print	\$65
eBook	\$61

Available December 2021.
Pre-order early for greatest savings.

Quickfinder Health Care Reform Handbook

Your trusted tax quick reference health care reform guide

Health Care Reform has wide-ranging implications for individuals and employers. Employer mandates to provide insurance coverage, credits and subsidies to help individuals purchase coverage, marketplaces for acquiring coverage and reporting requirements and taxes are some of the many rules that impact your clients. They are likely to have questions. We've got the answers. Our *Health Care Reform Quickfinder Handbook* makes it easy for you to quickly locate answers and keep your clients in compliance.

Topics covered in the *Handbook* include:

- Employer mandate to offer health insurance to employees
- Penalty for not providing adequate insurance and guidance on responding to IRS penalty notices
- Premium tax credit and cost-sharing subsidies for individuals
- Obtaining health insurance through a state marketplace
- Premium tax credit eligibility, reporting, and reconciling
- Health insurance market reforms
- Small employers eligible for SHOP participation
- Small employer health insurance credit
- Notice and reporting requirements
- Other taxes and fees



Product code: HCR / 1 Volume

Print	\$485
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PPC's Guide to Health Care Reform

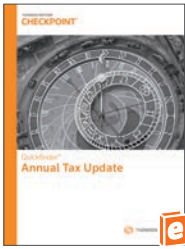
Stay current on the latest changes and new guidance

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. 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 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.
- Information on the various types of health arrangements employers can provide for employees, including individual coverage HRAs (ICHRAs), excepted benefit HRAs (EBHRAs), and qualified small employer HRAs (QSEHRAs).
- 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.



Product code: Q21T	
Print	\$65
eBook	\$61

Available January 2022.
Pre-order early for the greatest savings.

Quickfinder Annual Tax Update

Get up to speed on 2021 developments with the *Quickfinder Annual Tax Update*. This single go-to-resource makes it easy to stay abreast of changes affecting your clients.

- Covers relevant new tax legislation, court cases, tax regulations and IRS pronouncements affecting individuals and small businesses
 - American Rescue Plan Act of 2021
 - Additional legislation enacted throughout 2021
- Explains the tax developments; provides illustrative examples and practical insights needed to understand their impact
- Includes handy reference tables and charts to quickly locate answers and respond to client questions

Whether you are preparing for busy season, getting up to speed on new tax rules, or simply looking for a new rate or amount, the Quickfinder Annual Tax Update will save you valuable time and provide accurate answers.



Product code: QIP	
Print	\$65
eBook	\$61

Available May 2021.
Pre-order early for greatest savings.

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

Quickfinder Handbooks provide quick answers to a broad range of individual tax-planning topics.



Order online at tax.tr.com/saveqf25



Call **+1 800 431 9025** to speak to a sales specialist.



Product code: QSM	
Print	\$65
eBook	\$61



Product code: QIR	
Print	\$65
eBook	\$61

Available January 2022.
Pre-order early for greatest savings.

Social Security & Medicare Quickfinder Handbook

As the baby boomers move into their retirement years, tax and financial professionals are likely to encounter questions from their clients about Social Security and Medicare. The Social Security & Medicare Quickfinder Handbook is an affordable, easy-to-use Handbook that provides the answers you need quickly. Here's what you'll get with this useful tool:

- Coverage of all aspects of Social Security benefits, including eligibility, worker and family benefits, disability benefits, the SSI program, plus income tax issues to consider
- Information on Medicare eligibility and enrollment, plus the different types of coverage and costs
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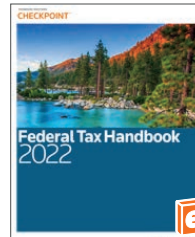


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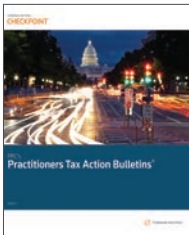
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