

Webcast Acronym: SCHA-TU (2014)

Webcast Title: Schedule A – Form 1040 - Tax Update – Going Beyond IRS Audits

Recommended CPE Hours: 2 CPE Credit Hours.

Highlights:

Come join Larry Stein as he discusses new developments, trends, and techniques relating to Schedule A – Form 1040 – Itemized Deductions. Larry will update you on Qualified Residence Interest and Charitable Contribution developments. IRS Audits of Schedule A will also be covered. IRS Form 2106 – Unreimbursed Employee Business Expenses will be covered. Larry will also review Investment Interest, Medical Deductions, Taxes, and Miscellaneous Itemized Deductions.

Learning Objectives:

Upon the successful completion of this webcast, the participants will be able to:

1. Explain the deduction elements for Qualified Residence Interest (QRI).
2. Explain the documentation requirements for cash charitable contributions.
3. Explain the “qualified appraisal” rules for non-cash charitable contributions.
4. Explain selected miscellaneous itemized deductions.

Major Topics:

- Qualified Residence Interest – Qualifying Debt, Qualifying Residence, Computing Deductions, And Points.
- Investment Interest.
- Charitable Contributions – Documentation, Recordkeeping, Qualified Appraisals – Noncash Charitable Contributions.
- Unreimbursed Employee Business Expenses – IRS Form 2106.
- Medical And Dental Expenses – Medical Care, Who Is Covered, Qualified Long-Term Care Insurance Contracts, And The New 10% Of AGI Threshold.
- Taxes You Can And Cannot Deduct.

- Non-Business Casualty And Theft Losses.
- Income In The Respect Of A Decedent And The Estate Tax Deduction – IRC 691(c).
- Miscellaneous Itemized Deductions.

Designed For: CPAs with at least six (6) years of experience. You must have a basic knowledge of federal taxation.

NASBA Fields Of Study: Taxes.

Level: Intermediate.

Presentation Method: Live Webcast Lecture With Questions And Answers.

Recommended CPE Credit Hours: 2 CPE credit hours.

Advanced Preparation: Basic knowledge of federal taxation.

Texas Registration: 009838

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