2013 Tax Workshop Agenda:

* Review of conflicting information guidelines
* Review of tax issues required for verification purposes
* Personal Tax Returns:
	+ Review of 1040EZ – line-by-line
	+ Review of 1040A – line-by-line
	+ Review of 1040
		- Line-by-line review; where each line originates, what it means, how it is used in financial aid and verification issues from each line
		- Sched A – Itemized Deductions – medical/casualty/taxes/charity
		- Sched B – Interest & Dividends
		- Sched C – Sole Proprietorship – community property impact on FM
		- Sched D – Capital Gains/Losses – cash flow
		- Sched E – Rent, Royalties, Partnerships, S-Corps, Estates, Trusts
		- Sched F – Farms
		- Sched SE – Self-Employment Taxes – Earned Income
		- W-2 – Earned income, untaxed income codes, box 14
* Tax filing thresholds for 2012
* Tax filing status rules for 2012; single, married, head of household, widow(er)
* 2013-14 Targeted Verification;
	+ - New verification items
		- Categories
		- Mandatory language
* 2012 IRS Data Retrieval
	+ - Availability due to delayed filing season
		- Who may use IRSDRT
		- What items are verified by using the IRSDRT?
* 2012 Tax transcripts
	+ - When to obtain a transcript
		- How to obtain a transcript
		- Types of transcripts
			* Tax return transcripts
			* Tax account transcripts
		- Changes from 2011 lines references
		- Best in class tools available
		- Amended tax return requirements
* Business Taxes: brief introduction to partnerships and s-corps along with related K-1’s