

2023 University of Illinois Tax School
Day 1

Objectives

At the completion of this seminar, participants will be able to:

1. Apply specific concepts and strategies covered in the seminar while preparing 2023 tax returns.
2. Advise clients about planning strategies applicable to their situations.

NASBA Field of Study

Taxes; Regulatory Ethics

NASBA Program Level

Overview

IRS Categories

Federal Tax (2), Regulatory Ethics (2), Federal Tax Update (4)

Prerequisite

At least several years of experience as a professional tax preparer and an understanding of tax rules and regulations associated with preparing individual returns

CPE Credits

Based on actual attendance, up to 8 CPE credits (CPA, EA, CFP®, IL insurance) which includes 2 credits for ethics (not for CFP ethics), and up to 6.5 IL MCLE taxation including 1.75 IL MCLE professional responsibility credits.

Agenda

Session 1

8:00 a.m.	Introduction
8:05 a.m.	New Developments (75 min)
9:20 a.m.	Break (10 min)
9:30 a.m.	New Developments, cont. (50 min)
10:20 a.m.	Break (10 min)
10:30 a.m.	Retirement Plan Issues for Individuals (80 min)
11:50 a.m.	Adjourn

Session 2

8:00 a.m.	Ethics (65 min)
9:05 a.m.	Break (10 min)
9:15 a.m.	Ethics, cont. (40 min)
9:55 a.m.	Break (10 min)
10:05 a.m.	Individual Taxpayer Issues (60 min)
11:05 a.m.	Rulings & Cases (30 min)
11:35 a.m.	Questions & Answers (25 min)
12:00 p.m.	Adjourn