



Syllabus for Continuing Education Program

Program Provider: Society of Financial Service Professionals Twin Cities
(MN Dept. of Commerce Provider #8724)
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Program Title: Tax Update 2017
Speaker: Scott M. Nelson, Attorney at Law, CPA
Hellmuth & Johnson, PLLC
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Date: Thursday, December 7, 2017
Time: 11:00 AM Sign-in/Networking
11:15 AM Lunch Buffet Open
11:30 AM Chapter Business
11:50 AM – 12:50 PM Presentation
12:50 PM – 1:00 PM Break
1:00 PM – 1:30 PM Presentation
Location: **Midland Hills Country Club**
2001 Fulham Street
Roseville, MN 55113

CE Credits: This educational offering is PENDING by the Minnesota Commissioner of Commerce as satisfying 1.5 hours of general classroom credit toward continuing insurance education requirements.
CFP: 1.5 hours PENDING standard credits
CLE: 1.5 hours PENDING standard credits
A certificate of attendance is available for individuals requesting CPE and PRP (Professional Recertification Program – formerly PACE) credits.

Who Should Attend: Estate planners, financial planners, investment advisors, insurance producers, retirement counselors, CPAs and JDs

Educational Level: Intermediate

Course Description

With tax reform a top priority for Congress and the President, and the new tax year looming, tax issues are foremost on the minds of professionals and clients. The presentation will provide an update of tax changes that occurred in 2017, a brief review of the significant changes that have taken place since the Bush Tax Act of 2001, and an overview of planning recommendations for individuals and businesses in 2018. The presentation will cover income tax issues for individuals, business entities, investors, and charitable organizations, as well as a brief overview of state tax issues and planning, and transfer tax (gift, state and federal estate tax, state inheritance tax, and GST) developments and issues. We will cover latest developments from Washington, D.C. and strategies for dealing with prospective tax reform.

Learning Objectives

1. 2017 Tax Developments
2. Recent Tax Policy Changes
3. Federal and State Tax Developments and Trends
4. Planning for 2018 and beyond

Outline:

- I. Recent Developments/What Next | 10 minutes
- II. Individual/Investor Taxes | 10 minutes
- III. Business Taxes | 10 minutes
- IV. Fiduciary/Transfer Taxes | 10 minutes
- V. IRS/Treasury Procedure and Administration | 10 minutes
- VI. MN Personal Taxes | 10 minutes
- VII. MN Business Taxes | 10 minutes
- VIII. MNDOR Procedure and Administration | 10 minutes
- IX. Concluding Remarks/ Q&A | 10 minutes

90 minutes

Instructional Materials for Students:

- PowerPoint in handout

Examination & Answers:

- No exam