Syllabus for Continuing Education Program

Program Provider:	Society of Financial Service Professionals Twin Cities (MN Dept. of Commerce Provider #8724) 4707 Highway 61, Suite 196 White Bear Lake, MN 55110-3227 651.815.0668 admin@sfsptwincities.org Website: www.sfsptwincities.org
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Program Chair:	Joan Gilles, CRPC, CLU, ChFC 612.436.3733 jgilles@financialplanpartners.com
Program Title:	**Tax Update 2017**
Speaker:	Thomas McCarr, J.D., CPA PricewaterhouseCooper LLP 612.596.4797 | Thomas.mccarr@pwc.com
Date:	Thursday, December 7, 2017
Time:	11:00 AM Sign-in/Networking 11:15 AM Lunch Buffet Open 11:30 AM Chapter Business 12:00 PM – 1:30 PM Presentation
Location:	**Midland Hills Country Club** 2001 Fulham Street Roseville, MN 55113
CE Credits:	This educational offering is APPROVED by the Minnesota Commissioner of Commerce as satisfying 1.5 hours of general classroom credit toward continuing insurance education requirements. CFP: 1.5 hours APPROVED standard credits CLE: 1.5 hours APPROVED 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