

**TaxSpeaker**  
4403 Hamburg Pike, Suite A  
Jeffersonville, IN 47130  
**Phone : (877) 466-1040**



# TaxSpeaker®

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**Earn CPE the way YOU want to!**

# Meet Our Nationally Renowned Speakers!

## Bob Jennings CPA, EA, CFP®

is a nationally renowned author and speaker, presenting continuing education classes to over 100,000 tax professionals over the world. Bob is a licensed CPA (Indiana), and an IRS Enrolled Agent. Bob is also a prolific author and has published over 60 professional articles in such magazines as the Journal of Accountancy as well as many other professional and consumer publications; annually authors several tax, accounting and technology manuals; and is a regular columnist for FoxBusiness.com. As the founder of his own regional CPA firm in 1984, Bob has dealt exclusively with individuals and small business financial issues for over 30 years.



## Experience The TaxSpeaker Difference

At TaxSpeaker, we are dedicated to delivering timely & expert knowledge through each of our nationally renowned speakers while utilizing the latest technology that impacts our industry as a whole.



## Bill Leonard CPA, MAFF, CGMA

holds licenses and memberships in Massachusetts, Rhode Island, Alaska and Singapore. He is the sole shareholder of W.A Leonard & Company, P.C. and PT W.A. Leonard employing sixteen multi-lingual professionals that focus on meeting the needs of small businesses, individuals and fiduciaries. A graduate of Bentley University and Babson College, Bill has been in practice since 1981. He has over twenty years of college and seminar teaching experience.

## Terry Bakker CPA, EA

is the owner of O'Leary's TaxService, Ltd. in downtown Vancouver, Washington. Terry graduated with her BS in Business Administration: Accounting from Portland State University in 1988 and has worked in tax ever since. She became an Enrolled Agent in 2008. In addition to running an active tax practice, Terry is a past president of the Oregon Association of Independent Accountants, as well as holding other positions, including head of the Education Committee. As Taxspeaker's resident expert on new economy issues Terry writes and speaks on emerging issues such as consumer to consumer businesses, cryptocurrency and marijuana tax issues.



“ We have attended TaxSpeaker seminars for at least 10 years. They are the best we have found anywhere. The speakers are very knowledgeable and well prepared. The slides and manuals are quite comprehensive and accurate. ”



## Ron Roberson CPA

is a well-known tax lecturer who has more than 20 years of experience teaching throughout the United States. Ron annually speaks to thousands of tax professionals about the latest business and personal tax law developments, using his sense of humor and friendly speaking style to keep people coming back year after year. In addition to authoring multiple tax articles and manuals, Ron also continues to work with his partner in a tax and accounting practice in Sonora, California. Ron includes real life examples from his practice to make tax issues come alive and help complicated subject matter make more sense.

## Jeffery A. Milligan CPA

has owned and operated Baker Milligan CPAs in his hometown of Monticello, Indiana since 2004. The firm has since purchased five additional accounting practices employing as many as fourteen employees and preparing over 1,800 tax returns. Jeff started in public accounting, after graduating from the Indiana University Kelly School of Business in 1993, with Crowe Horwath. He also spent seven years in industry as a controller for a large electrical contractor in the Indianapolis area. Jeff has owned and operated several small businesses attributable to his love of being an entrepreneur. Jeff enjoys public speaking and inspiring people to be the best version of themselves. Jeff and his wife Rebecca of over 25 years have three daughters.



## Excellence In Education

## Mark Mirsky CPA, MST, CGMA

is a licensed CPA in Illinois with in-house corporate accounting experience, and has worked in both large and small accounting firms. He has a Master's in Taxation from University of Illinois, Urbana-Champaign. In 2004 Mark co-founded ROI Business Services, LLC, where he leads the Taxation and Management Advisory Services. In 2018 he founded ROI CPE, LLC to provide quality education to the CPA industry.

He currently is teaching for Taxspeaker around the country, a former instructor for other national seminar companies.



## Gregg Goodsell EA

is an enrolled agent in Tempe, Arizona and has been in private practice for 33 years. Gregg is a highly accomplished tax seminar speaker and writer, having written and presented seminars on complex tax laws to thousands of CPAs, enrolled agents, attorneys, and tax preparers. Gregg has prepared well over 20,000 personal and business tax returns in his career and enjoys interacting with seminar attendees, answering their questions and providing real-world solutions to their tax problems. Gregg and his wife Amy have been married 34 years and have two children.



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# Excellence in Education



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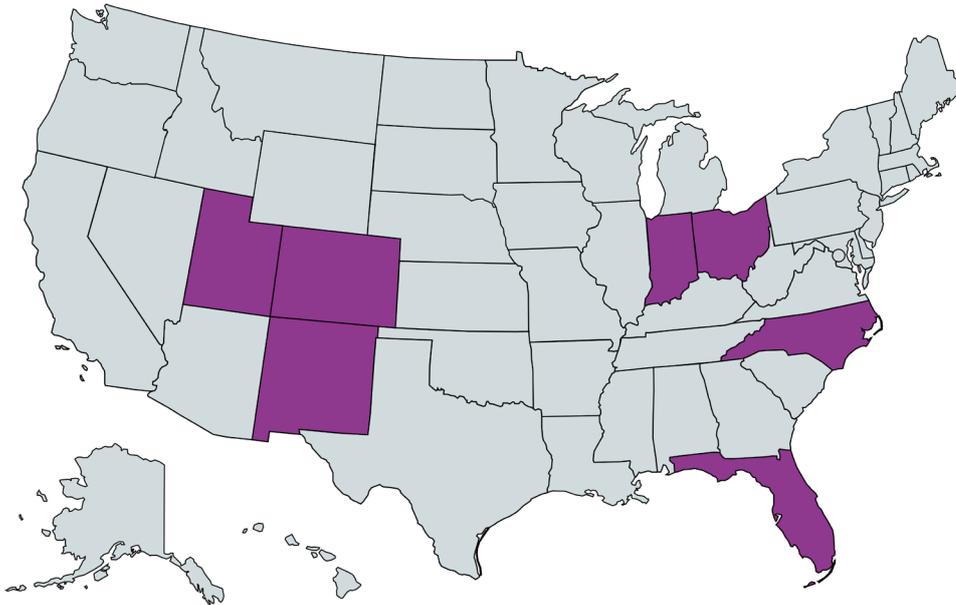
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# 2019 Live Self-Sponsored Seminars



## Midwest

**Taxspeaker Office :**  
4403 Hamburg Pike, Jeffersonville, IN 47130

5/29/19	Social Security \$259/\$299
5/29/19	1041's for Trusts & Estates \$259/\$299
5/30/19	Preparations, Compilations & Reviews \$259/\$299
5/30/19	Complete Retirement Guide \$259/\$299
5/31/19	Medicare \$109/\$129
5/31/19	Depreciation & Amortization \$109/\$129
9/4/19	S Corporations from A-Z \$259/\$299
9/5 & 9/6	Business Tax in Depth \$389/\$449
9/9/19	Federal Tax Update-Corporations & Partnerships \$259/\$299
9/10/19	LLCs & Partnerships \$259/\$299
11/4 & 11/5	1040 Tax in Depth \$389/\$449
11/27/19	Federal Tax Update-Individuals \$259/\$299
12/26 & 12/27	1040 Tax in Depth \$389/\$449

# 2019 Live Self-Sponsored Seminars

## Indianapolis, IN (New location)

Marriott Indianapolis North  
3645 River Crossing Parkway, Indianapolis, IN 46240

11/25 & 11/26 1040 Tax in Depth \$389/\$449

## Cleveland, OH

Embassy Suites by Hilton Cleveland Rockside  
5800 Rockside Woods Blvd. N, Independence, OH 44131

11/11 & 11/12 1040 Tax in Depth \$389/\$449

## Southwest

### Denver, CO

Embassy Suites by Hilton Denver Stapleton  
4444 N. Havana St., Denver, CO 80239

8/5 & 8/6 1040 Boot Camp \$450

8/15/19 Individual Tax Planning \$259/\$299

8/19 & 8/20 Business Tax in Depth \$389/\$449

12/16 & 12/17 1040 Tax in Depth \$389/\$449

### Fort Collins, CO

Fort Collins Marriott  
350 East Horsetooth Rd., Ft. Collins, CO 80525

8/14/19 1041's for Trusts & Estates \$259/\$299

9/24 & 9/25 Business Tax in Depth \$389/\$449

11/6 & 11/7 1040 Tax in Depth \$389/\$449

### Salt Lake City, UT (New location)

Doubletree by Hilton  
5151 Wiley Post Way, Salt Lake City, UT 84116

8/14/19 Individual Tax Planning \$259/\$299

9/23 & 9/24 Business Tax in Depth \$389/\$449

11/14 & 11/15 1040 Tax in Depth \$389/\$449

# 2019 Live Self-Sponsored Seminars

**Albuquerque, NM**  
Albuquerque Marriott Pyramid  
5151 San Francisco Rd. NE, Albuquerque, NM 87109

8/16/19 Individual Tax Planning \$259/\$299

12/16 & 12/17 1040 Tax in Depth \$389/\$449

## Southeast

**Sarasota, FL**  
Holiday Inn Sarasota Bradenton  
8009 15th Street East, Sarasota, FL 34243

8/23/19 Individual Tax Planning \$259/\$299

8/26 & 8/27 Business Tax in Depth \$389/\$449

12/18 & 12/19 1040 Tax in Depth \$389/\$449

**Pensacola, FL**  
Hilton Garden Inn Pensacola Airport  
1144 Airport Blvd., Pensacola, FL 32504

12/2 & 12/3 1040 Tax in Depth \$389/\$449

**Charlotte, NC**  
Embassy Suites by Hilton Charlotte  
4800 South Tyron St., Charlotte, NC 28217

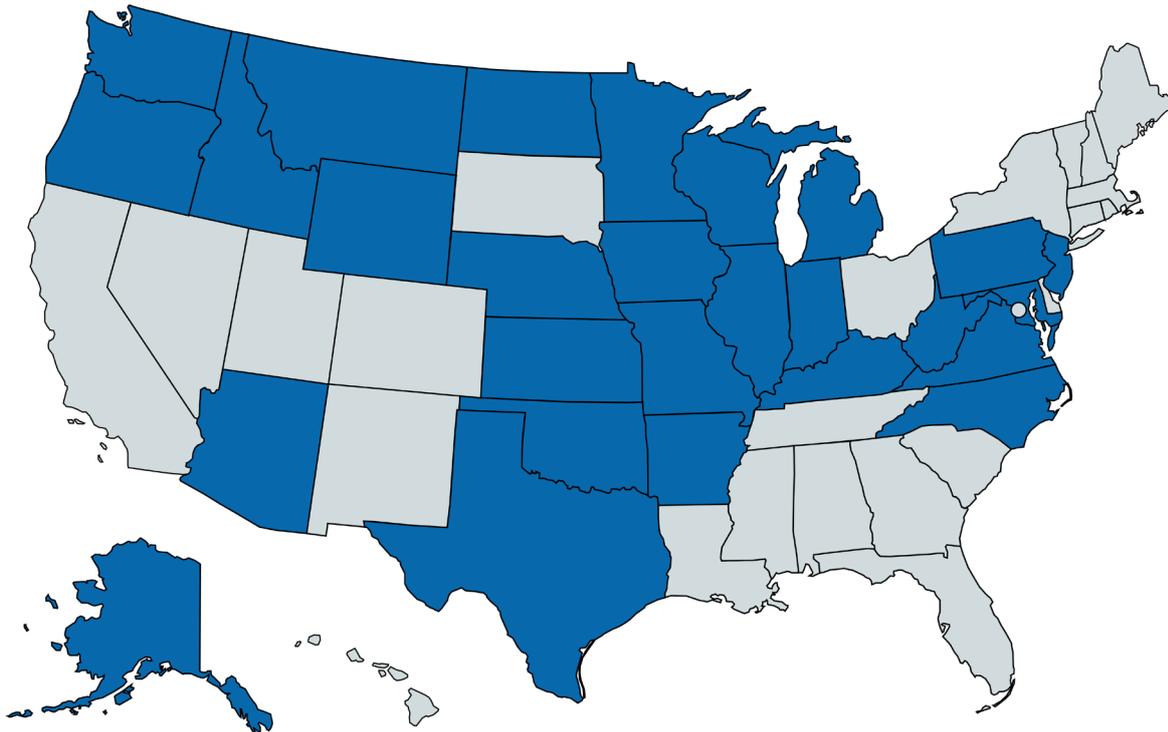
8/8 & 8/9 1040 Boot Camp \$450

**Register 21 days before the date of the seminar to receive the EARLY BIRD SPECIAL!**

*Early Bird prices are listed above.*

*1040 Boot Camp is excluded from early bird pricing.*

# 2019 Live State-Sponsored Seminars



Alaska Society of Independent Accountants  
<http://www.asiacct.org>

Arizona Association of Accounting and Tax Professionals  
<http://www.aaatp.org/>

Arkansas Society of Accountants  
<http://www.arksocietyofaccountants.com>

Arkansas Society of CPAs  
<https://www.arcpa.org/content/ascpa-home.aspx>

Idaho Association of Public Accountants  
<https://iapacct.com/>

Idaho Society of CPAs  
<http://www.idcpa.org>

Independent Accountants Association of Illinois  
<http://www.illinoisaccountants.com/>

Indiana CPA Society  
<https://www.incpas.org/>

Accountants Association of Iowa  
<http://www.aaiowa.com/>

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# 2019 Live State-Sponsored Seminars

Iowa Society of CPA's  
[www.iacpa.org](http://www.iacpa.org)

Public Accountants Association of Kansas  
<http://www.paak.org/>

Kentucky Society of Certified Public Accountants  
<https://www.kycpa.org/>

Maryland Society of Accounting and Tax Professionals, Inc  
<http://www.msatp.org>

West Michigan CPE, LLC  
<http://www.westmichigancpe.com>

Minnesota Association of Public Accountant  
<http://www.mapa-mn.com>

Minnesota Society of EAs  
<http://www.mnsea.org/>

Missouri Society of Accountants  
<http://www.missouri-accountants.com>

Montana Society of Public Accountants  
<http://mspamt.org>

Montana Society of CPAs  
<https://www.mscca.org/>

Nebraska Society of Independent Accountants  
<https://nebsia.net/seminars>

New Jersey Association of Public Accountants  
<https://njapa.info>

North Carolina Society of Accountants  
<http://www.ncsa1947.org/>

North Dakota Society of Accountants  
<http://www.ndsacct.com>

Oklahoma Society of Accountants  
<http://www.ospa.org>

Oklahoma Society of CPAs  
<https://www.oscpa.com/>

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# 2019 Live State-Sponsored Seminars

Oregon Association of Independent Accountants  
<http://www.oaia.net>

Pennsylvania Society of Tax & Accounting Professionals , Northeast Chapter  
<http://www.pspa-state.org>

Pennsylvania Society of Tax & Accounting Professionals -South Central Chapter  
<http://www.pspa-state.org>

Pennsylvania Society of Tax & Accounting Professionals- Philadelphia Chapter  
<http://www.pstap.org>

Pennsylvania Society of Tax & Accounting Professionals- Buxmont Chapter  
<http://www.pstapcpe.com>

Pennsylvania Society of Tax & Accounting Professionals- Western PA chapter  
<http://www.pstapcpe.com>

Texas Society of CPA's  
<https://www.tscpa.org/>

Virginia Society of Tax & Accounting Professionals  
<http://www.virginia-accountants.org>

Washington Association of Accounting & Tax Professionals  
<http://www.waa.org/>

West Virginia Society of CPAs  
<https://www.wvscpa.org>

Wisconsin Association of Accountants  
<http://www.waainc.org>

Wyoming Society of Certified Public Accountants  
<https://www.wyocpa.org/>

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# Online Webinar Schedule At-A-Glance

Please visit our website at [www.taxspeaker.com](http://www.taxspeaker.com) for an up-to-date schedule with detailed information regarding our online webinar schedule.

May 20.....	Clergy Tax Choosing a Business Entity
May 21.....	C Corporation Employee Independent Contractor
May 22.....	Practice Management
May 23.....	Corporate Formation Issues
May 29.....	Long Term Care S Corps Built in Gains Social Security 1041's for Trusts & Estates
May 30.....	Complete Retirement Guide Preparations, Compilations & Reviews
May 31.....	Medicare Depreciation
June 11.....	Surtaxes
June 12.....	Practice Management
June 13.....	C Corporations Entity Conversations
June 14.....	Like Kind Exchanges
June 17.....	Clergy Tax
June 18.....	Social Security
June 19.....	Circular 230 Ethics Choosing a Business Entity
June 20.....	1041's for Trusts & Estates
June 24.....	Complete Retirement Guide
June 25.....	Accountants Reports & Letters Compilations
June 26.....	Preparations, Compilations & Reviews S Corps Built in Gains
June 27.....	Medicare Depreciation
June 28.....	Long Term Care
July 8.....	Circular 230 Ethics
July 9.....	1041's for Trusts & Estates
July 10.....	Social Security
July 24.....	Preparations, Compilations & Reviews

# Online Webinar Schedule At-A-Glance

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July 25.....	Compilations Accountants Reports & Letters
July 29.....	Depreciation Medicare
July 30.....	Complete Retirement Guide
July 31.....	Corporate Formation Issues Employee Independent Contractor
August 1.....	Entity Conversions Like Kind Exchanges
August 5.....	Surtaxes
August 7.....	Preparations, Compilations & Reviews
August 8.....	Circular 230 Ethics
August 9.....	Clergy Tax Choosing a Business Entity
August 19.....	1041's for Trusts & Estates
August 20.....	C Corporations
August 21.....	Social Security
August 22.....	Accountants Reports & Letters Compilations
August 23.....	Medicare Depreciation
August 27.....	Complete Retirement Guide
August 28.....	Long Term Care S Corps Built in Gains
August 29.....	Practice Management
September 4.....	S Corporations from A-Z
September 5 & 6.....	Business Tax in Depth
September 9.....	Corporate Formation Issues Employee Independent Contractor Federal Tax Update-Corporations & Partnerships
September 10.....	LLCs and Partnerships in Depth
September 11.....	Circular 230 Ethics
September 12.....	Preparations, Compilations & Reviews Choosing a Business Entity
September 13.....	Clergy Tax
September 16 & 17.....	Business Tax in Depth Medicare

# Online Webinar Schedule At-A-Glance

Please visit our website at [www.taxespeaker.com](http://www.taxespeaker.com) for an up-to-date schedule with detailed information regarding our online webinar schedule.

September 17.....	1041's for Trusts & Estates
September 17 & 18.....	Business Tax in Depth
September 18.....	S Corporations from A-Z
September 19.....	Social Security
September 20.....	Compilations
	Accountants Reports & Letters
September 23.....	Federal Tax Update-Corporations & Partnerships
September 24.....	Complete Retirement Guide
September 25.....	LLCs and Partnerships in Depth
September 26.....	C Corporations
September 27.....	Depreciation
October 1 & 2.....	Business Tax in Depth
October 3.....	S Corporations from A-Z
October 4.....	Choosing a Business Entity
	Surtaxes
October 17.....	Complete Retirement Guide
October 18.....	Medicare
	Depreciation
October 21.....	Social Security
October 22.....	Preparations, Compilations & Reviews
October 23.....	1041's for Trusts & Estates
	Business Tax in Depth
October 24.....	Business Tax in Depth
	Federal Tax Update-Corporations & Partnerships
October 25.....	Circular 230 Ethics
	Like Kind Exchanges
October 28.....	LLCs and Partnerships in Depth
October 29.....	Accountants Reports & Letters
	Compilations
October 30.....	Practice Management
October 31.....	Entity Conversions
November 4 & 5.....	1040 Tax in Depth
November 6 & 7.....	Business Tax in Depth
November 6.....	1041's for Trusts & Estates
November 7.....	Depreciation
	Medicare
November 8.....	S Corporations from A-Z

# Online Webinar Schedule At-A-Glance

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November 11 & 12.....	1040 Tax in Depth
November 11.....	C Corporations Employee Independent Contractor
November 12.....	Circular 230 Ethics Choosing a Business Entity
November 13.....	Social Security
November 14.....	Preparations, Compilations & Reviews
November 18.....	Complete Retirement Guide LLCs in Depth
November 19.....	Federal Tax Update-Business ClergyTax Corporate Formation Issues
November 20 & 21.....	1040 Tax in Depth
November 22.....	Compilations Accountants Reports & Letters
November 25 & 26.....	Business Tax in Depth
November 27.....	Long Term Care S Corps Built in Gains Federal Tax Update-Individual
December 3.....	S Corps in Depth
December 4 & 5.....	1040 Tax in Depth
December 9.....	Complete Retirement Guide Federal Tax Update-Individual
December 10 & 11.....	1040 Tax in Depth
December 12.....	Social Security
December 13.....	1041's for Trusts & Estates
December 16 & 17.....	Business Tax in Depth
December 16.....	Medicare Depreciation
December 17.....	LLCs in Depth
December 18 & 19.....	1040 Tax in Depth
December 19.....	Federal Tax Update-Business
December 20.....	Federal Tax Update-Individual
December 26 & 27.....	1040 Tax in Depth
December 30.....	Preparations, Compilations & Reviews Federal Tax Update-Individual
December 31.....	Accountants Reports & Letters Compilations Circular 230 Ethics

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# 1040 Boot Camp

At the conclusion of this course, students will be trained in basic individual income tax preparation for the average taxpayer, as well as understanding the ethical and business profit aspects of the income tax preparation business.

## Two Convenient Locations

*Discounted room rate at hotel!*

### ☑ Denver

Embassy Suites-Stapleton

August 5-6, 2019

Day 1: 8am-5pm

Day 2: 8am-4pm

### ☑ Charlotte

Embassy Suites, Charlotte airport

August 8-9, 2019

Day 1: 8am-5pm

Day 2: 8am-4pm

For additional details please call us!

1-877-466-1040

## Overview of Course

This intensive 2-day course begins with an overview of what is expected of an average beginner tax professional in terms of profit generation, accuracy and ethics. It will provide minimally experienced staff (including beginners) with hands-on training from 2 firm-owning instructors with over 75 years of small firm tax preparation experience. It will be team taught by Bob Jennings and Ron Roberson.

## Details

**CPE Credit Hours: 16**

### Registration Fee:

**\$450** per student

*Includes: Breakfast and lunch each day, manual and comprehensive training.*

**\$400** per student

*two or more students from same firm*

**\$360** per student

*five or more from same firm*

# TaxSpeaker®



Front row left to right: Jean Jennings, Bob Jennings, Kathy Wright  
Back row left to right: Samantha Zarantonello, Matt Johnson,  
Sandy Hurst, Ryan Jennings, Casey Jennings

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