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Income Tax Seminar Program
Department of Agricultural Economics
308 C.E. Barnhart Building
Lexington, Kentucky 40546-0276

 **Cooperative
Extension Service**

 **Martin-Gatton**
College of Agriculture,
Food and Environment
**INCOME TAX
SEMINAR**

**Continuing Education
for Tax Practitioners
& Other Professionals**

Designed For:

Tax Preparers
Accountants/CPAs
Attorneys
Enrolled Agents
Certified Financial Planners
Banking Professionals
Insurance and Real Estate Professionals

Member of:

The Land Grant University Tax
Education Foundation

Accepted by:

The Certified Financial Planners
Board of Standards
National Association of State
Boards of Accountancy
Kentucky State Board of Accountancy
Internal Revenue Service
Kentucky Department of Insurance
Kentucky Bar Association

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Seminar Content

A two-day, intermediate seminar that will provide comprehensive information and valuable updates that will prepare you to file 2024 returns. For 2024, you have the option of attending our in-person seminar or a webinar via Zoom. Topics to be covered include ethics, trusts and estates, individual tax issues, business taxes, LLCs, retirement, investments and savings, agricultural and natural resources, IRS issues, and new and expiring legislation.

Program Level: Intermediate.

There are no advanced preparation requirements for this course, which is designed for professional tax preparers with at least one year of preparation experience.

Program Materials

The following materials are **included** with your registration fee:

- 2024 National Income Tax Workbook produced by the Land Grant University Tax Education Foundation in both physical and digital forms. Those attending in-person will pick up their workbook at the seminar sites. If you are registered for the online seminar, it will be mailed to you in advance.
- 2025 Master Tax Guide published by CCH and mailed upon availability. (List: \$219)
- Kentucky Department of Revenue update (via email)

Learning Objectives

After completing these courses, you will be able to identify federal and state tax law updates for the coming year, effectively and accurately complete business and individual tax returns, communicate to clients how life changes may affect their tax situations, answer tax questions and resolve the tax problems that arise in everyday business and personal transactions, and recognize the legal tax deductions and exemptions businesses and individuals may claim.

Instructors

Bill Eversole & Jimmy Blandford:
Louisville-based CPAs and tax practice owners
Internal Revenue Service Educational Liaisons
Kentucky Dept. of Revenue Tax Policy Consultants
University of Kentucky Farm Management Specialists

Continuing Education Credits

Approved for:

CPAs: 17 hours total
 Federal Tax Law..... 11 hours
 Federal Tax Law Updates..... 3 hours
 Regulatory Ethics..... 2 hours
 Kentucky Tax Law Update..... 1 hour
 (by the Kentucky State Board of Accountancy & National Association of State Boards of Accountancy – NASBA)

Certified Financial Planner Board of Standards: 16 hours

Kentucky Department of Insurance: 17 hours
(includes 2 hours of ethics)

IRS Enrolled Agents, AFSP Participants, & PTIN holders: 16 hours total

Federal Tax Law..... 11 hours
 Federal Tax Law Updates..... 3 hours
 Ethics..... 2 hours

Our IRS Provider Number is XFC9W.

IRS Continuing Education is only mandatory for Enrolled Agents (EAs) and Enrolled Retirement Plan Agents. Participation in CE by all other tax return preparers is not an official designation, but these individuals may voluntarily take continuing education. IRS has developed the Annual Filing Season Program (AFSP) for non-credentialed tax return preparers. This Federal Income Tax Seminar will not include the six (6) hour Annual Federal Tax Refresher course of the test. The course counts toward continuing education for AFSP.

Kentucky Bar Association CLE credit: 14.25 hours total
 General..... 12.5 hours
 Ethics..... 1.75 hours

Certificates of Completion will be emailed to participants within 10 days of the conclusion of the seminar program.

Locations

Louisville October 28 & 29
EP Tom Sawyer Ky. State Park
3000 Freys Hill Rd.
Louisville, KY 40241

London November 18 & 19
Laurel Co. Extension Office
200 Co. Ext Rd
London, KY 40741

Paducah December 5 & 6
McCracken Co. Extension Office
2025 New Holt Road
Paducah, KY 42001

Burlington November 14 & 15
Boone Co. Enrichment Center
1824 Patrick Drive
Burlington, KY 41005

Owensboro December 3 & 4
Daviss Co. Extension Office
4800A New Hartford Road
Owensboro, KY 42303

Lexington December 16 & 17
Altec Arena, Kentucky Horse Park
4089 Iron Works Pkwy.
Lexington, KY 40511

2024 UK Income Tax Seminar Program Registration Form

- Register by mail or FAX payment required using the form below.
- Duplicate this form for multiple registrations.
- Each person must be registered individually to ensure that he or she receives accurate continuing education credit.

Name: _____

- CPA CFP Attorney EA
 Tax Return Preparer AFSP

Company: _____

PTIN: _____

Address: _____

A PTIN # is P-followed by 8 digits.
Only required if you need CE hours reported to the IRS.

City: _____ State: _____ Zip: _____

Insurance Professional

Phone: () _____ Fax: () _____

KYDOI: _____ or

NPN: _____

Email*: _____

** Please add uktaxseminars@uky.edu to your trusted contacts list to ensure timely notifications regarding the seminar.
A unique email address is required for each participant.*

INDICATE THE SEMINAR YOU PLAN TO ATTEND

Louisville
October 28 & 29

London
November 18 & 19

Paducah
December 5 & 6

Zoom Webinar
November 7 & 8

Burlington
November 14 & 15

Owensboro
December 3 & 4

Lexington
December 16 & 17

Zoom Webinar
December 18 & 19

FEES

Early-Bird Seminar Fee	Qty _____	\$ _____	\$399 by October 31
Regular Seminar Fee	Qty _____	\$ _____	\$449 from November 1
<u>Extra</u> copies of books	Qty _____	\$ _____	\$180
<u>Extra</u> Tax Education Workbook	Qty _____	\$ _____	\$85
<u>Extra</u> Master Tax Guide	Qty _____	\$ _____	\$100
Discount for 5 or more participants registering at one time (fees only)		\$ - _____	10% discount
Total		\$ _____	

Special Accommodations: University of Kentucky is committed to making its programs accessible to individuals with disabilities. If you require an accommodation or special assistance for this program due to a disability, please contact us at 859-218-5112 as far in advance of the program as possible so that these needs can be addressed.

Register now:
ukincometax.ca.uky.edu



PAYMENT MUST ACCOMPANY REGISTRATION!

Mail to: UK Income Tax Seminar
308 C.E. Barnhart Building
Lexington, KY 40546-0276

Fax to: 859-323-0098
Faxed registrations w/o a credit card number will not be accepted.

DO NOT send credit card information via email.

Payment Method: Check Visa Mastercard Discover American Express

Multiple registrations may be combined. Make checks payable to: **“University of Kentucky”** with “Tax Seminar” in the memo.

Email for receipt (if different from above): _____

Card Account Number: _____ Exp. Date: _____ / _____

Amount (\$): _____ Cardholder Name: _____ Card Zip Code: _____

General Information

Fee: The early bird registration fee for all in-person and online seminars is \$399. Registrations received after October 31st, 2024 cost an additional \$50 (\$449 total).

Schedule: Registration begins at 7:45 a.m. Seminars begin at 8:00 a.m. and conclude at 5:00 p.m. with a one-hour lunch break.

In-person, live seminars

Times are local. Refreshments are served throughout the day, lunch is on your own.

Smoking: All seminars will be smoke-free.

Electronic communications: prohibited during our seminars. No voice recording permitted due to legal issues.

Room temperature: Satisfactory meeting room temperatures are difficult to maintain. We suggest that you dress in layers to ensure comfort.

Online seminars via Zoom

Guidelines for accessing Zoom will be sent via email after your registration is received. Times are EST.

Cancellations

Cancellation requires a 3-day notice before the start of the seminar to qualify for a refund (less a \$25 administrative fee). Split location attendance and transfers are discouraged but if necessary are permitted on a space-available basis and require a \$50 administrative fee. In the event of cancellation due to adverse weather, registrants may 1) transfer to a later seminar, or 2) receive full credit for registration at a seminar the following year.

For More Information

Phone: 859-218-5112

Toll-free: 888-808-3303

Fax: 859-323-0098

Email: UKTaxSeminars@uky.edu

Website: ukincometax.ca.uky.edu



University of Kentucky is registered with the National Association of State Board of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State Boards of Accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National

Registry of CPE Sponsors through its website: www.learningmarket.org. Other concerns should be referred directly to: Jonathan Shepherd, Director, UK Tax Education Program (859-218-4395)

From prior participants:

“Great instructors, very fortunate to have such knowledgeable people teaching us.”

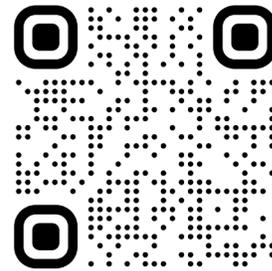
“ I have attended the UK Seminar for the last 9 years because the topics are pertinent, the instructors are knowledgeable, and the cost is very reasonable.”

“Very knowledgeable and incorporated ‘real life’ situations in comparison to the topic being discussed.”

“The instructors were very effective and enthusiastic, which made the seminar interesting and enjoyable. Great job!”

Register now:

ukincometax.ca.uky.edu



Our goal is to conduct Income Tax Seminars that meet the continuing education needs of tax professionals. We appreciate your support and welcome any comments or suggestions that will improve the quality and usefulness of the seminars.

Jonathan Shepherd, State Director

Trish Murphy, Program Coordinator

 Cooperative Extension Service



Disabilities accommodated with prior notification.

Educational programs of Kentucky Cooperative Extension serve all people regardless of economic or social status and will not discriminate on the basis of race, color, ethnic origin, national origin, creed, religion, political belief, sex, sexual orientation, gender identity, gender expression, pregnancy, marital status, genetic information, age, veteran status, or physical or mental disability. UNIVERSITY OF KENTUCKY, U.S. DEPARTMENT OF AGRICULTURE, AND KENTUCKY COUNTIES, COOPERATING