



The Bulletin

East Bay Association of Enrolled Agents

*A Chapter of the California Society of Enrolled Agents
Affiliated with the National Association of Enrolled Agents*

December 2014

NEXT MEETING Wed, December 17, 2014

Place: **Francesco's (Oakland)**
8520 Pardee Drive at Hegenberger Road

4:30 Board Meeting

6:15 Networking

6:45 Dinner Buffet

7:30 Program: **"Tax Treaties"**

Cost: \$35.00 with reservation by Friday, Dec 12
\$45.00 with reservation after deadline

Course numbers and credit:

IRS: WZA09-T-01189-14-I

CTEC: 1001-CE-7666

1 Hour of Federal Tax Law Topics

Sign up online at:

<https://www.123signup.com/calendar?Org=ebaea>

(Please print out your confirmation to ensure that you clicked all the right buttons to register) Questions: email ebaean@ebaean.org (preferred) or call 800-617-1040.

December Session: "Tax Treaties and Foreign Tax Credit"

Speaker: Carlos Zepeda

by Peggy Hall, EA and Robert L Seymour, EA

When dealing with U.S. citizens with assets and income in foreign countries, and non-U.S. citizens who do business or earn personal income in the U.S., we often have to deal with the interaction of U.S. and foreign tax laws. Business income and even investment income often has foreign taxes which may allow a credit.

Most tax treaties start with the Model Tax Convention and are then adapted to fit the particular countries' requirements. So, when your client has international tax consequences, you need to study the tax treaty.

During this session we will learn how to read and understand relevant treaty provisions. Mr. Zepeda will cover the foreign tax credit, how it works, adjustments to be made, differences between amounts paid and accrued, and currency conversion calculations and issues.

This EBAEA program will cover commonly faced issues, such as:

- 1) Where to find treaty information on foreign income,
- 2) Understanding the purpose and theory of Form 1116,
- 3) Clarifying residency issues for taxpayers, and
- 4) Determining the proper category of income.

Carlos Zepeda has been a very popular speaker with EBAEA, and is an important resource for us. The topic can easily take more than an hour, even for the basics, and Mr. Zepeda has agreed to allow plenty of time for questions.

With 1 hour of CE on Federal Tax Law Topics, the target audience is: Enrolled Agents, attorneys, CPAs and unenrolled preparers.

Carlos Zepeda is a Senior Policy Analyst with the Large Business and International Division (LB&I) of the IRS. In this capacity, he provides technical advice and program support on international individual compliance matters. Mr. Zepeda began his IRS career in 1983 as a revenue agent, and has been in the International Office of the IRS for the last 9 years.

TOYS FOR TOTS

This year, once again, we are supporting the US Marine Corps' annual Toys for Tots drive. Please bring a new, unwrapped toy to the December dinner meeting. Joanne Anderson will collect them all and take them to the USMC collection center.

Call Joanne at (925) 938-9086 with any questions. Thank you for supporting our drive!

Joanne Anderson has been managing this gift collection each year for many years, and we want to thank her for her dedication and persistence! This charitable activity is on top of all the volunteer work she does for our Chapter. Please let her know you appreciate her work.

PRESIDENT'S MESSAGE

by Patty Pringle, EA, President, EBAAEA

November came and went so fast. There was so much to be thankful for! Of course, I am thankful to my family and friends, but I am also thankful for the support of the Members of our Chapter. I am thankful that I have been able to reach out and get assistance. There are so many areas of tax law that I am unfamiliar with. Clients call me with questions, and too often, I don't know the answer. Should they get a Reverse Mortgage? How do I complete a Trust Return? My EBAAEA membership is priceless!

Thank you to Ray Chan, Scoutmaster of Boy Scout Troop 805 of Danville, for bringing members of his Troop to our November Dinner Meeting. The Scouts presented the Colors and led us in the Pledge of Allegiance.

During the meeting we also recognized and expressed our appreciation to Veterans that are members of our chapter. Thank you to Robert Seymour, EA (also the Editor of the EBAAEA Bulletin) for arranging to have the Scouts attend our meeting.

Thank you to our Membership Chair, and 2nd Vice President, Aida Torres, EA for arranging our Member Appreciation Night at the November Dinner Meeting. It was a great night, getting to network with the Members and enjoy a glass of wine.

November was also a month of sadness. Two of our past members passed away. Bill Harrison, EA, who many of you may remember as a volunteer that worked at the sign-in desk for our dinner meetings passed away on November 17, 2014. Many of you may also remember Joe Verdoia, EA who was a Past President of our Chapter 1995-1996 and passed away on November 15, 2014. We're all grateful to these two Members for all of their past service as volunteers for our Chapter.

At our December 17th Dinner Meeting, which will be held at Francesco's Restaurant in Oakland, Joanne Anderson, EA will be collecting toys for the Toys for Tot's Program. Please bring a toy, unwrapped, to the dinner meeting for this very worthwhile cause.

As we all get ready for the upcoming tax season, I hope you will reach out to your fellow Members to ask for help when you need it. There is a wEAalth of knowledge out there.

Finally I wish all of you a very Happy Holiday Season and a Very Happy New Year!

GOT CARPOOL ?

by Peggy Hall, EA

Carpooling to dinner meetings can allow you a much more enjoyable evening. Look around for Members who you know are coming from your area. Or let me know you're interested, and I'll try to organize a carpool group. Peggy Hall, at halloftaxes@gmail.com

DINNER FEE INCREASE

Announcement for the Board of Directors

In an effort to keep the Chapter in good fiscal shape, in light of rising costs over the last few years, the Board of Directors has made the decision to increase the fee for our monthly dinner meetings. Beginning with the January 2015 meeting, the new fee will be: \$40 with a reservation by the Friday before the meeting; \$50 with a reservation after that Friday deadline.

The Board knows your time and money are valuable. We strive to provide educational and networking opportunities that we hope you will continue to find worth your monthly investment of time and money.

MEMBERSHIP COMMITTEE REPORT

by Aida Q. Torres, EA, Membership Chair

What a wonderful celebration we had on our "Appreciation Night" for all the current Members who joined us for the November dinner meeting! You can feel and see the spirit of camaraderie among our Members. It was also a gesture of Thanksgiving, for all the Members of our Chapter to honor our Veterans, including those who are current EBAAEA members!

We are going on to continue our "festive mood" for the holidays in December. This is the month of Christmas, gift giving, religious celebration, family re-unions, and community sharing. Please remember our collection of gifts for unfortunate children, and bring a toy to help our "Santa Claus"! We have no special event planned for the Chapter this month, except for all our Members to enjoy this "Blessed Holiday Season"!

Please welcome our two new EA members, who joined us in November; they are: Author Alexander and Nabil Andeshmand. Welcome to our Chapter!

Our re-scheduled Orientation Event will be held on January 21st, 2015. There will be an e-blast of information to all our Members, and we will need replies from those Members who plan to attend, to prepare the orientation packets and to inform the guest speakers!

To get more information on coming events, please login to: www.ebaea.org.

If you have recently joined, and your name is not listed, contact Aida, at aida@aidatorres.com or by phone to 510-724-6409. All new members, professional associates and professional affiliates will receive a packet from CSEA. All new EA members will receive a packet and certificate from EBAAEA. If you are a new EA member, and haven't received a packet from the Membership Committee, please let us know.

BULLETIN AVAILABILITY

by Robert L Seymour, EA

You may want to store, as a favorite in your browser, this permalink to access the Bulletin:

<http://www.ebaea.org/Bulletin/current.pdf>

The same link will work every month.

MEMBERS SPEAK

Upcoming presentations by EBAEA Members include:

December 2 (Tue): "Payroll Seminar," 9 am – 3 pm, in San Francisco, 455 Market Street, Sixth Floor.

Michele Zimmerman, michele.zimmerman@comcast.net

December 10 (Wed): "Basic Payroll," 9 am - 3 pm, in Oakland. Andy Rogers, 510-332-0401 or

Andy@TaxBuddha.com

December 10 (Wed): "Audit Prevention for Schedule C Clients," 4 pm - 6 pm, North Bay CSEA seminar at Inn Marin, 250 Entrada Dr, Novato. Andy Rogers will cover available IRS resources, including Audit Technique Guides and Statistics, to assist tax preparers in preparing accurate returns, and will review Code sections on Start-Up Expenses, Employee vs. Independent Contractor and Hobby Loss Rules.

For EBAEA members to list speaking engagements next month, please email Andy@TaxBuddha.com with details.

EBAEA EMAIL LISTS

EBAEA sends news to Members via two one-way (send-only) email distribution lists. Subscription is free and completely voluntary, and you can subscribe or unsubscribe to either list any time you wish. For more information and to manage your subscription, visit:

<http://ebaea.org/cgi-bin/dada/mail.cgi>

CHECK YOUR CE CREDITS!

by Marjorie Williams-Jones, EA, Education Coordinator

After every meeting, you can (and should) be checking the CE credits that have been reported for you at the website <https://rpr.irs.gov/datamart/mainMenuUSIRS.do>

You can also find this site through IRS.gov / For Tax Pros / Register or under "Renew your PTIN."

After logging in, a window will open that allows you to re-new your PTIN (if needed), read your Messages from the IRS; at the very bottom of the window is "View My Continuing Education Credits."

After you check your credits, please let me know if you find anything amiss for EBAEA meetings you've attended. Contact me at marj@marjtax.com.

EAs AVAILABLE TO SPEAK

Although our speaker's development group has been dormant this year, there are still a number of chapter members who welcome the opportunity to speak on a variety of tax topics. If you know of a group that would like a guest speaker, please contact Andy Rogers, EA, or Mark Bole, EA for suggestions.

JIM STERN LEGISLATIVE DAY – JAN 9!

by Peggy Hall, EA

Please join us for Jim Stern Legislative Day!

Though sponsored by CSEA, the event isn't about CSEA – it's about *you*, and success depends on your taking part, not leaving it to others! It is also a very *fun* day, the most fun you will have all year, and it's a great way to start the year.

This CSEA Members-only annual event is geared toward developing the Society's grassroots advocacy program and providing guidance and instruction to Enrolled Agents on how to effectively lobby their legislative representatives.

The annual lobby day will begin with presentations from various leaders and experts who will explain legislative issues impacting tax professionals and taxpayers, as well as tips and techniques EAs can use during their visits with legislative offices later that day. CSEA will coordinate appointments with representatives from both Senate and Assembly offices for each participant who registers to attend.

The program will include an opportunity for participants to practice their new-found advocacy skills on fellow EAs before assembling in groups by region to call on legislative offices. These visits give Members the opportunity to introduce themselves, explain what EAs do, discuss any legislative concerns and lobby for CSEA's positions, and offer themselves as a resource to policymakers as tax experts.

The day will conclude with a wrap-up where participants will share what they learned during their legislative visits and plan any follow-up that needs to occur. This is a prestigious and interesting event you will not want to miss.

In addition to the benefits for you as a Member, and CSEA as a professional organization, there is a competition between CSEA chapters to see who can get the most participants! One more reason to join us!

Details:

Date: Friday, January 9, 2015

Schedule:

7:15 am – 8:00 am – check-in, breakfast, Hyatt Regency Sacramento

8:15 am – 2:15 pm – State Capitol visits

2:30 pm – 3:30 pm – debriefing, light snacks, Hyatt Regency Sacramento

Who: CSEA Members

Cost: \$80.00

There is no continuing education offered for this event.

If you'd like to ride to Sacramento with others, contact me at halloftaxes@gmail.com or 925-388-1040, especially if you have never been to the capital building in Sacramento.

QUICKFINDER ORDER TIME !

by Clare Flores, EA

Once again, we are able to get a group discount, and our chapter gets a commission on each item you buy. Get an excellent reference for the tax season and support your chapter at the same time. Just fill out the form (at the back of this Bulletin) and send it to the chapter office or to me. You can also order on line at <http://quickfinder.thomson.com> ; just be sure to use the discount code Q521. Your order will be shipped directly to you at the price indicated on the form.

Please email clare@taxandpayroll.com if you have any questions or need additional information.

Small Group Tax Meetings

Antioch /Brentwood Fridays 8:00am
Brentwood Café, 8500 Brentwood Blvd, Brentwood
Ken Seamann EA (925) 634-8297

Danville Area 4th Tue 9:30am
Pascals French Oven, 155 Railroad Ave, Danville
Michael Power EA (510) 366-8836

Oakland Area (Near BART) 4th Tue 9:00am
Buttercup Café, 229 Broadway, Oakland
Andy Rogers EA (510) 332-0401

Livermore Area Fridays 8:45am
Shari's Restaurant, 1116 East Stanley Blvd, Livermore
Jerrilynn Krebs EA (925) 606-8181

Castro Valley 3rd Tue 8:00am
Carrow's, 2723 Castro Valley Blvd @ Lake Chabot, CV
Dagmar Bedard EA (510) 537-3883

South Alameda County 1st Wed 9:30am
Mimi's, 24542 Hesperian, Southland Mall, Hayward
Sal Romo EA or Walt Thomas EA (510) 487-1691

Email-only Group as needed
Send an email to halloftaxes@gmail.com
Peggy Hall EA (925) 388-1040

DOES CIRCULAR 230 ALLOW IT?

by Robert L Seymour, EA

It doesn't belong in the Humor section, but I found it worth sharing:

"Excellence is a good habit, but do not strive for perfection – it will prevent you from ever finishing anything."
-- Eva Rosenberg, EA, "Tax Mama"

MANUAL PAYROLL IN QUICKBOOKS

by Robert Seymour, EA and Duncan Sandiland, EA

Duncan Sandiland brought to our attention an article in Intuitive Accountant, regarding controlling the cost of payroll accounting using QuickBooks.

The introduction to the article notes, "As QuickBooks payroll subscription prices rise, fewer small businesses may decide to move ahead with automating their payroll . . ." The author continues, "not many of us even bother to let our clients know that there is an 'old fashioned' alternative to Intuit payroll offerings. . . . This article is intended to insure that readers are aware that you can still prepare payroll manually inside of QuickBooks."

For those of you with clients affected by the cost of Intuit's services, you may want to check out this article at:

http://www.intuitiveaccountant.com/payroll_merchant_services/manual-payroll-in-quickbooks/#.VIU60pV0zIW

BULLETIN ADVERTISING POLICY

by Robert L Seymour, Bulletin Editor

To encourage more Members to use the Bulletin to fill their needs, we present the Bulletin advertising policy:

- 1) All Bulletin notices are run for a maximum of three months. If you wish to run a notice for a longer period, you must resubmit the notice.
- 2) Maximum notice size is 1.5 column inches. This equals a space one and one-half inches high by one column (3.5 inches) wide. The standard Bulletin font is Times New Roman 11 point.
- 3) The Bulletin Editor reserves the right to edit any notice for style, content and length.
- 4) All notices must be submitted (and payment received) by the 25th of the month prior to initial publication. Send desired text to: EBAEA.Editor@gmail.com.
- 5) Member notices seeking or offering employment, clients or EA-practice-related matters are run at no charge as a Member benefit. This includes an ad run by a firm which employs a Member. Member notices offering other services or products, and all non-Member notices are run at the standard fee of \$150 for the three-month insertion.

The Bulletin Editor reserves the right to modify or reject any notice which, in the sole opinion of the Editor, violates any of the principles of EBAEA.

CSEA ONLINE LEARNING PORTAL

The CSEA Learning Portal offers exceptional tax education, on demand.

Did you miss SuperSeminar this year? Is there a SuperSeminar session you wanted to attend but conflicted with the one you chose? What about one you attended, and took careful notes, but now that you need to resolve an issue, they don't make clear what the speaker said? What about a client matter that just came up and you're not sure how to handle it?

Would you like a free hour of learning? CSEA Members are offered a complimentary one-hour webinar featuring IRS OPR Director Karen L. Hawkins. It's a very informative hour, though it doesn't qualify for CPE.

CSEA offers online replays of SuperSeminar presentations, and the 2014 sessions are now available. This is a great refresher, or a primer for a subject you need more info on now.

Available sessions include:

Ron Roberson, CPA, on Social Security

Lisa Ihm, EA, on Foreclosures and COD

Mark Seid, EA, CPA, on the New Repair Regs

Check this out now! Go to www.csea.org and mouse over the "Education & Events" tab, then mouse down and click on "Online Continuing Education". You won't be sorry...

HUMOR

"I just taught my kids about taxes, by eating 38% of their ice cream." -- Conan O'Brien

A mugger stops a guy on the street at gunpoint. "Give me all your money," he demands. The victim is indignant and yells at the mugger, "You cannot do this because I am an IRS Agent!" "In that case," says the mugger, "give me all MY money!"

"When it comes to taxes, there are two types of people. There are those who get it done early, also known as psychopaths, and then the rest of us." -- Jimmy Kimmel

"The auditors have just left, sir."

"Did they check the books?"

"Very thoroughly."

"What did they say?"

"They want 15% to keep quiet."

"Two years ago, it was impossible to get through on the phone to the IRS. Now, it's just hard to get through. That is what we call progress."

-- Charles Rossotti, former IRS Commissioner

"Unquestionably, there is progress. The average American now pays out twice as much in taxes as he formerly got in wages." -- H. L. Menken

An accountant dies and goes to heaven. St. Peter is there, looking through the files and asking a few quick questions. "What sort of accountant were you?" The accountant replies, "A tax accountant." St. Peter then asks, "What is your name?" The accountant gives him his name, and St. Peter locates his file. "Oh, yes, we've been expecting you. You have reached your allotted life span." The accountant says, "I do not understand how that can be! I am only 48 years old." St. Peter looks again at the file and says, "Well, that is impossible!" The tax accountant then says, "Why do you say that?" St. Peter responds, "We've been looking over your time sheets and the hours you have charged your clients. By our reckoning, you must be at least 93 years old!"

"I want to find out who this FICA guy is, and how come he's taking so much of my money"

-- Unnamed professional hockey player

CALENDAR OF EVENTS

December 2014

- 17 EBAEA Dinner Meeting:
"Tax Treaties and Foreign Tax Credit"

January 2015

- 8 Mission Society: Cast in Concrete Updates
@ Mariani's Inn, Santa Clara
- 9 Jim Stern Legislative Day
In Sacramento
- 15 North Bay seminar: K-1 Competencies
@ Inn Marin, Novato
- 16 North Bay: Last Chance Updates seminar
@ Inn Marin, Novato
- 17 Solano-Napa chapter: Fed/CA Tax Update
@ Courtyard Fairfield Napa Valley Area

February 2015

- 7 Save the date (Saturday) for **Tax Help Day!**

2014 - 2015 Board of Directors and Committee Chairs

Web Page <http://www.ebaea.org> Bulletin editor: EBAEA.Editor@gmail.com. (Robert L Seymour, EA)

President: Patty Pringle, EA 510-912-1682
1st VP: Al Wise, EA 707-634-4TAX
2nd VP: Aida Torres, EA 510-724-6409
Treasurer: Tim Hintzoglou, EA 925-930-7737
Secretary: Carrie Kroeger, EA 925-686-1600
Immed Past Pres: P Gail Nanbu, EA 925-943-3993
Director 2013 - 2015:
[temporary vacancy]
Sal Romo, EA 510-471-9492
Marjorie Williams-Jones, EA 510-482-6204
Director 2014 – 2015:
Katherine Judd, EA
Peggy Hall, EA 510-388-1040
CSEA Director: Al Wise, EA 707-634-4TAX

Communication Committee (2nd VP)

Chair: Aida Torres, EA 510-724-6409
Bulletin: Robert Seymour, EA 925-212-8062
Disaster Services: Janet Bridges, EA 510-505-0818
Legislative: Peggy Hall, EA 925-388-1040
Membership: Aida Torres, EA 510-724-6409
Practice Preservation: Linda Fox, EA 925-846-5913
PIA: Patty Pringle, EA 510-912-1682
Quickfinders: Clare Flores, EA 510-785-8356
Social Affairs: Luciann Leraul, CPA 925-518-9076
Social Affairs: Carolyn Krieg, EA

Website: Patty Pringle, EA 510-912-1682
IRS Practitioner Panel: Phil Fiegler, EA 510-530-1174
CTEC Panel: Walt Thomas, EA 510-487-1691

Education Committee (1st VP)

Chair: Al Wise, EA 707-634-4TAX
Continuing Ed: vacant
Educ. Coord.: M. Williams-Jones, EA 510-482-6204
Mini Seminar Team: Patty Pringle, EA 510-912-1682
Program: Peggy Hall, EA 925-388-1040
SEE Class: vacant
Tax Talk: Patty Pringle, EA 510-912-1682
Town Hall: Patty Pringle, EA 510-912-1682
Town Hall: Peggy Hall, EA 925-388-1040
VITA Team: vacant

Administration Committee (IPP)

Chair: P Gail Nanbu, EA 925-943-3993
Bylaws/SOP: Sal Romo, EA 510-471-9492
Bylaws/SOP: Clare Ashby, EA 925-462-0538
Budget & Finance: Walt Thomas, EA 510-725-8356
Chapter Office: Dagmar Bedard, EA 510-537-3883
Financial Review: Luciann Leraul, CPA 925-518-9076
Nominating: P Gail Nanbu, EA 925-943-3993
Volunteer Coordinator: Patty Pringle, EA 510-912-1682

EAST BAY ASSOCIATION OF ENROLLED AGENTS

6400 Village Parkway, Suite 201, Dublin CA 94568-3006

(800) 617-1040 or (925) 320-7802 fax (925) 553-3515 email: ebaea@ebaea.org

If you haven't already done so, please note the current address for the East Bay Association of Enrolled Agents:

EBAEA

6400 Village Parkway, Suite 201

Dublin, CA 94568-3006

2014 QUICKFINDER TAX YEAR PRODUCTS

CSEA- East Bay Chapter.

Please use your association discount code on every order!

Payable to: Quickfinder

Phone: 800.510.8997

36786 Treasury Center

Chicago, IL 60694-6700

Quickfinder.thomson.com

Payment Enclosed:

☐ Check☐ Money Order

Credit Card Account #

☐ Visa☐ MasterCard☐ Discover☐ AMEX

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

Expiration
Date

--	--	--	--

Month Year

Cardholder's Name

Cardholder's Signature

CC Payments—Note: Our policy is to charge your credit card at the time of order.

DISCOUNT CODE Q521Customer Name.....
(If known)

Company Name

Name

Address.....
(If P.O. Box, please include physical address for UPS.)

City, State, Zip

Email.....
(Required for order confirmation and order fulfillment.)

Day Phone (.....)

Products	✓ for 3-Ring Binder [■]	Quantity/ Number of Units		Unit Price (see below)	Total	**Auto-Renew / ++Auto-Ship
		Print	eBook**			
1040 Quickfinder Handbook (Q40)	<input type="checkbox"/>					<input type="checkbox"/> eBook Only
Small Business Quickfinder Handbook (QSB)	<input type="checkbox"/>					<input type="checkbox"/> eBook Only
Premium Quickfinder Handbook (QPE)	<input type="checkbox"/>					<input type="checkbox"/> eBook Only
NEW! Health Care Reform Quickfinder Handbook (QHC)						<input type="checkbox"/> eBook Only
All States Quickfinder Handbook (QST)						<input type="checkbox"/> eBook Only
Individuals—Special Tax Situations Quickfinder Handbook (QSS)						<input type="checkbox"/> eBook Only
Depreciation Quickfinder Handbook (QDE)						<input type="checkbox"/> eBook Only
Social Security and Medicare Quickfinder Handbook (QSM)						<input type="checkbox"/> eBook Only
IRA and Retirement Plan Quickfinder Handbook (QIR)						<input type="checkbox"/> eBook Only
Tax Planning for Individuals Quickfinder Handbook (QIP)						<input type="checkbox"/> eBook Only
RIA Federal Tax Handbook (FTHP)++						<input type="checkbox"/>
NEW! Quickfinder Tax & Financial Tools* (TBXI)**	Download <input type="checkbox"/>	----		\$159 \$99		<input type="checkbox"/>
NEW! Quickfinder Annual Tax Update (Q14T)				\$47 \$45		<input type="checkbox"/> eBook Only
California Tax Quickfinder Handbook (QCA)			----	\$53 \$51		----
Quickfinder Tax Tips Newsletter (QFTN)**			----	\$63 \$61		<input type="checkbox"/>
Laminated Tax Tables for Individual Returns (QLIP)			----	\$16		<input type="checkbox"/> eBook Only
Laminated Tax Tables for Business Returns (QLBP)			----	\$16		<input type="checkbox"/> eBook Only
Questions? Visit Quickfinder.com or call 800.510.8997 Your association receives a donation for each product purchased under this special discount code—and you receive a discounted price on every product!		■Add \$3 for each Quickfinder handbook 3-ring binder ordered.				
		Order Subtotal				
		Shipping & Handling				----
		Sales Tax (apply your rate)				
		Total				

NEW!**Quickfinder Tax & Financial Tools**

The one and only tool set you'll need

- ONE comprehensive tool set
- ONE download
- ONE low price

Quickfinder Tax & Financial Tools contains hundreds of useful and time-saving tax and utility tools – tax calculators, tax worksheets, Affordable Care Act tools, client handouts and organizers, financial calculators, tax forms and flowcharts.

Delivered with state of the art technology, Quickfinder's tools are arranged in an easy-to-use format with all the tax, small business and financial planning tools you need to assist in the preparation of tax returns, and advise your clients in tax, small business and financial planning matters. Plus, the client management system enables you to save files to client folders for future reference and use, as well as cut down on paper filing systems.

Quickfinder Product Pricing Guide	1 unit	2 – 10 units	11 – 20 units	21+ units
Quickfinder Handbooks (Print OR eBook)	\$47 \$45	\$45 \$43	\$42 \$40	\$40 \$38
Quickfinder Handbooks (Print AND eBook)	\$59 \$56.25	\$57 \$53.75	\$53 \$50	\$50 \$47.50
Premium Quickfinder Handbook (Print OR eBook)	\$69 \$67	\$66 \$64	\$63 \$61	\$61 \$59
Premium Quickfinder Handbook (Print AND eBook)	\$87 \$83.75	\$83 \$80	\$79 \$76.25	\$77 \$73.75
All States Quickfinder Handbook (Print OR eBook)	\$80 \$78	\$76 \$74	\$72 \$70	\$67 \$65
All States Quickfinder Handbook (Print AND eBook)	\$100 \$97.50	\$95 \$92.50	\$90 \$87.50	\$84 \$81.25
Shipping for all Quickfinder Handbooks	1-21 unit(s) = \$5.50/unit, over 21 units = \$3/unit			
Other Products Pricing Guide	1 unit	2 – 4 units	5-10 units	11-25 units
RIA Federal Tax Handbook, 2015 Edition	\$95.75 \$67.03	\$86.20 \$60.30	\$81.45 \$57.02	\$76.65 \$53.66
Shipping for RIA Federal Tax Handbook	\$11.75 per unit	\$8.85 per unit	\$7.30 per unit	\$5.75 per unit

* 12 month subscription for up to 5 users

++Auto-Shipments / **Auto-Renewals

By checking the boxes above indicate your consent to enroll in auto ship/auto renewal, as applicable.

Discounts: The highest discount will be applied to your order; Cannot combine discounts & special offers. **Qty Discounts:** Combined quantities of the SAME TITLE are eligible for a qty discount (e.g., buy six 1040 Handbooks & pay \$43 ea., instead of \$45 ea.). Discount **does not apply** when purchasing different titles (e.g., buy one 1040 & one Small Business Handbook, each title is \$45).

S/H and Sales Tax: Applicable state & local sales tax & shipping/handling charges will be added at time of order.



THOMSON REUTERS™