

CENTRAL CHAPTER

PA: PX-000501L , NJ: 20CE00159200, NY: 002280, IRS: E3S5R

1099-R Box by Box – Federal and PA Taxation & QCD

Tuesday, November 12, 2019

Best Western Eden Resort
222 Eden Road
Lancaster, PA 17601
717-569-6444

Registration & Breakfast: 7:00—8:00 AM
CPE: 8:00 AM—12:00 PM

Full, Hot Breakfast Buffet Included

CPE: 3 Hours Federal Tax
1 Hour Non-Federal Tax

SPEAKER: Mary Lew Kehm, CPA

Registration Deadline: 11/7/19

ATTENTION
PSTAP Members who attend at least 5 chapter meetings in 2019 will receive a complimentary Deluxe Edition of THE TAXBOOK.

NAME: _____ ID # _____ PTIN # _____
See Mailing Label

Address: _____ City/State/Zip _____

Email Address: _____ Telephone: () _____ Fax: () _____

MEMBER (\$50) **STAFF (\$60)** **NON MEMBER (\$70)**

Check made payable to: CENTRAL CHAPTER PSTAP/PSPA is enclosed.

Credit Card: ___MC ___ Visa/Amex Acct # _____ Exp: _____

Signature: _____ CVV#: _____

Register online at www.pstapcpe.com

Amount Enclosed: \$ _____

Attention! Mailing Address: MAIL Form To: PSTAP Executive Office, 20 Erford Rd., Ste. 200A
Lemoyne, PA 17043 Fax: 717-737-6847 Questions?: 1-800-270-3352

1099-R Box by Box – Federal and PA Taxation & QCD Course Description:

1099-R Box by Box Federal Taxation – 2-hour Federal Tax – Basic - Prerequisite: Basic Tax Preparation Knowledge

This course will review the various types of income reported on Form 1099-R preparers will see in practice. We will explore each box of Form 1099-R, what it represents, and the ramifications for federal taxation. There will be an in-depth review of codes in box 7..

1099-R PA Taxation – 1-hour Other Tax – Basic – Prerequisite: Basic PA Tax Preparation Knowledge

This course will review the various types of income reported on Form 1099-R. We will explore each box of Form 1099-R, what it represents, and the ramifications for PA taxation, which can be very different from the federal treatment. There will be a review of codes in box 7 as well, their meaning for PA taxation, and how to calculate the taxable amount.

Tax Treatment of Qualified Charitable Distributions (QCD) from IRA Accounts –1-hour Federal Tax – Basic -- Prerequisite: Basic Tax Preparation Knowledge

This session will be an overview of Qualified Charitable Distributions – what accounts are eligible, which taxpayers are eligible, mechanics of making a QCD, recordkeeping requirements, tax return preparation, and opportunities and pitfalls.