

PHILADELPHIA TRI-COUNTY CHAPTER
 PA: PX-000501L , NJ: 20CE00159200, NY: 002280, IRS: E3S5R

**Webinar: Recent Federal Tax Legislation/
 Basic Taxation of Annuities**
 Tuesday, August 10, 2021

Important! This meeting is being held virtually via the web. To participate in this webinar you will need an email address to receive the link to access the webinar (please fill out email address below) and a device to view the webinar (PC, laptop, iPad, tablet). **The link will be provided through email the day before the webinar.**

Course Description: See back of this form

CPE: 4 Hours Federal Tax, 1:00—5:00 PM

Registration Deadline: 8/8/21

SPEAKER: Mary Lew Kehm, CPA

Name: _____ ID # _____ PTIN # _____
(See Mailing Label)
 Street Address: _____ City/State/Zip _____
 Email Address: _____ Phone: (____) _____ Fax: (____) _____

PSTAP Member: \$67 **Non-Member: \$97**

- Check made payable to: Philadelphia Tri-County Chapter is enclosed.**
- Credit Card: ____ MC ____ Visa/Amex Acct # _____ Exp: _____
 Signature: _____ CVV#: _____

MAIL Form To: PSTAP Executive Office Attn: Philadelphia Chapter Meeting
 20 Erford Road, Suite 200A, Lemoyne, PA 17043
 FAX: 717-737-6847 Questions?: 1-800-270-3352
 Register online www.pstapcpe.com

- ****EACH SEMINAR OR MEETING REGISTRATION REQUIRES A SEPARATE FORM AND CHECK**
- **REFUND POLICY: NO REFUNDS WILL BE ISSUED AFTER THE LINK TO ACCESS THE WEBINAR HAS BEEN SENT—NO EXCEPTIONS. NO SHOW—NO REFUNDS—NO EXCEPTIONS**
- **ALL TOPICS ARE SUBJECT TO CHANGE**

Recent Federal Tax Legislation/Basic Taxation of Annuities Course Description:

Session 1: Highlights of the most recent federal tax legislation: ARCA (American Rescue Plan Act); CAA 21; CARES Act; and SECURE Act. Emphasis on the most recent changes and those most affecting clients for 2021 will be highlighted.

Session 2: Basic coverage of annuity taxation within IRA and outside IRA. How to read Form 1099-R. Annuity taxation before distribution, distributions during life, and tax treatment after death. Tax treatment of common scenarios encountered in the local tax practice will be covered.