

57th Annual OSU Extension Income Tax Schools 2020 Fall Schedule & Registration

Date	Event Location	Presenters	Early-bird Deadline
Nov. 2-3	Old Barn and Grill 1375 West Elm, Lima	Fromer, Garvin, Liuzzo	Oct. 19
Nov. 4-5	Ole Zim's Wagon Shed 1375 State Route 590, Gibsonburg	Fromer, Lawrence, Liuzzo	Oct. 21
Nov. 9, 13, 16 & 20	Virtual Two-Day School (Taught in four 1/2-day sessions, 12:30-5:00 pm)	All	Oct. 26
Nov. 11-12	Ashland University John C. Meyers Convocation Center 820 Clermont Ave., Ashland	Fromer, Lawrence, Liuzzo	Oct. 28
Nov. 17-18	Presidential Banquet Center 4548 Presidential Way, Kettering	Fromer, Garvin, Liuzzo	Nov. 3
Dec. 4	Ethics Webinar, 10:00—Noon	Melinda Garvin	Dec. 3
Dec. 10-11	Nationwide & Ohio Farm Bureau 4-H Center 2201 Fred Taylor Dr. Columbus This school is only available via live stream.	All	Nov. 29
Dec. 18	Agricultural & Natural Resources Income Tax Issues Webinar	Greg Bouchard	Dec. 4

**COLUMBUS IN-PERSON
SCHOOL SOLD OUT**

Your Tax School Presenters



Merrill Fromer*
Revenue Agent
Fraud Technical Advisor
Examination Division, IRS



Melinda Garvin, EA
Tax Professional
Foos-Garvin Accounting



John Lawrence, CPA
John M. Lawrence &
Associates CPA LLC



Ken Liuzzo*
Tax Law Specialist
Large Business/International,
IRS

**Participation in the OSU Income Tax Schools is in their personal capacity and not in connection with their official duties as an IRS employee.*

Who should attend?

- ◆ Attorneys
- ◆ CPAs
- ◆ Enrolled Agents
- ◆ Financial Planners
- ◆ Tax Preparers (Intermediate level)



CFAES provides research and related educational programs to clientele on a nondiscriminatory basis.

For more information, visit cfaesdiversity.osu.edu. For an accessible format of this publication, visit cfaes.osu.edu/accessibility.

Costs

Two Day Course	Early Bird Registration*: \$375 Registration: \$425
One Day Course	Early Bird Registration*: \$250 Registration: \$300
Ethics Webinar	\$25 with school/Ag Issues \$50 without school/Ag Issues
Ag Issues Webinar	Early Bird Registration*: \$150 Registration: \$200
RIA Handbook	\$45

*Registration must be received two weeks prior to class

Tax School Registration Includes

- ◆ A hard copy of the 700+ page National Income Tax Workbook prepared by the Land Grant University Tax Education Foundation
- ◆ Morning snack and lunch at in-person schools
- ◆ On-line access to the 2009-2019 workbooks
- ◆ Ability to order the 2020 RIA Federal Tax Handbook for \$45 (a savings of over \$50)
- ◆ 50% discount on ethics webinar

Discounts Available!

Save \$50 on Tax School and Ag Issues Registrations when you register before the early bird deadline.

Send 5+ from the same company and receive 5% off
Send 10+ from the same company and receive 10% off
Sending more than 15 attendees? Contact us for pricing!
Email Julie for 5% and 10% discount codes.

Half-price Ethics webinar with any other registration.

Save over \$50 on the RIA Federal Tax Handbook with any registration.

Tax School Workbook Topics

Financial Distress	Ethics	QBI Deduction
Business Entity Issues	Retirement & Investment	Ag & Natural Resources Issues
Tax Rates/Useful Tables	New & Expiring Legislation (2 Chapters)	Individual Issues (2 Chapters)
Trust & Estates	IRS Issues	S Corp Tax Issues
Rulings & Cases		Business Issues

Tax School Contacts



Barry Ward
ward.8@osu.edu
614-688-3959



Julie Strawser
strawser.35@osu.edu
614-292-2433

Agricultural & Natural Resources Income Tax Issues Webinar with Greg Bouchard on Dec. 18, 8:45—3:30

If you are a tax professional that represents farmers or rural landowners or are a farm business owner, this five-hour webinar is for you. It will focus on issues specifically to those income tax returns.

Tentative Topics:

Depreciation of Farm Assets
Farm or Ranch Employer-Provided Meals and Lodging
Tax Issues for Family-Owned Farms
Family Farm Special Use Valuation
Self-Employment Tax on Agricultural Income
The Impact of New Legislation on Farmers
Like-Kind Exchange Issues Impacting Farmers

Getting Out of the Business of Farming
Retirement & Social Security Concerns for Farmers
Form 4797, Sale of Business Property
Qualified Business Income Tax Issues for Farmers
Tax Issues Arising Upon the Death of a Farmer
Current Uniform Capitalization Rules for Orchards and Vineyards



Instructor Greg Bouchard
Sr. Extension Associate, Cornell University & Director, Cornell Income Tax Schools

Welcome to the 57th Annual OSU Extension Income Tax Schools!

Continuing Education Credits Available:

Two Day Tax School (half for one day)

Accountancy Board of Ohio	16
IRS Office of Professional Responsibility	16
CFP Board of Standards	16
CLE, Ohio Supreme Court	13.5

Ethics Webinar

Accountancy Board of Ohio	2
IRS Office of Professional Responsibility	2

OSU Extension is one of Ohio's leaders in providing continuing education for tax preparers. Our two-day schools are designed for individuals who have some experience preparing and filing federal and state tax returns.

The classes are considered intermediate level and instruction will focus on recent legislation changes and the issues that you may encounter when preparing 2020 tax returns.

Highly qualified instructors will explain and interpret tax regulations and recent changes. We also offer a two-hour Ethics Webinar and a six-hour Ag & Natural Resources Income Tax Issues Webinar. Details are included in this brochure.

Register online today at go.osu.edu/2020tax



Ethics Webinar with Melinda Garvin on Friday, Dec. 4, 10-noon

Melinda Garvin, EA, will present a two-hour webinar on Ethics (Professional Standards and Responsibilities). The webinar is approved by the IRS Office of Professional Responsibility and the Accountancy Board of Ohio for two hours of CE credit.



The webinar is \$25 for tax school attendees and \$50 for non-attendees.

Completion certificates will be emailed following webinar.

2020 - The Year of Change for In-Person Schools

Some of our facilities were not approved to host a school or were no longer accepting outside meetings. This is only temporary as we deal with the pandemic.

Classes cannot exceed 50 people including instructors, so register early if you want to attend in person. Columbus is sold out.

Due to limited capacity, we cannot offer one-day schools at in-person locations. We do have a virtual option should you only need one day.

You may not attend a school if you or anyone living in your household is experiencing any of the following symptoms: fever, cough or shortness of breath. Should that occur on the day of your school, you will need to switch to a virtual class.

Face masks must be worn at all times while in the facility. Failure to comply will result in removal from class and no refund.

Seating will be physically distanced, and your class materials will be at your seat. Do NOT move seats or tables in class.

Buffets and self-serve food and drink options are currently not available. Due to these restrictions, you will get a morning snack and a plated or boxed meal. Should restrictions change, we will re-evaluate meal options. You will receive an email prior to school with meal details. Feel free to bring your own snacks and drinks.

New in 2020

- Two virtual school options—workbooks will be sent to you.
- CD and Flash Drives containing past 10 years of the workbook have been replaced with an on-line access portal.
- Safety restrictions for in-person schools include wearing a mask at all times while in the building unless eating, frequent hand washing/sanitizing, and not participating if you or anyone you live with is experiencing COVID-19 symptoms.
- Did you miss our Summer Update with John Lawrence? You can add the replay to your order.

Early bird Registration by Dec. 4: \$150

Registration after Dec. 4: \$200

Registration includes workbook which will be mailed prior to the webinar.

Ag Income Tax Issues Webinar attendees have the opportunity when registering to be added to our agricultural income tax practitioner list that we use as a resource to help farmers and landowners find qualified preparers. This is not an endorsement from OSU, just a resource for our clientele.

Completion certificates will be emailed following webinar.

Continuing Education Credits Available:

Accountancy Board of Ohio, CPAs (6 hours)
Office of Professional Responsibility, IRS (6 hours)
Supreme Court of Ohio, Attorneys (5 hours)

New to the OSU Income Tax School Program? Visit our website and sign up for our listserv to receive updates on future programs.

go.osu.edu/taxschools

Have a question following a program? Our instructors are available after our events to answer your questions. We are committed to helping you through the tax filing season.

