

# *2011 Individual Tax Update* ©

**Objective:** This course will focus on recent tax developments affecting all individuals. The developments may include highlights of recent tax legislation, new tax regulations, recent court cases, and IRS rulings. The focus of the class will be on the planning opportunities created by the recent developments.

## **What you will learn:**

- Tax filing status and tax exemptions
- Compensation income and deferral techniques
- Requirements of various tax deductions and credits
- Investment income, including capital transactions
- Real estate rental activities and the passive loss rules
- Estate and gift tax developments
- Tax penalties and IRS tax collection techniques
- Divorce taxation
- IRAs and 401(k) plans

**CPE:** 4 or 8 hours

**Level:** Update

**Category:** Tax

**Prerequisites:** None, but this compliments “**2011 Business Tax Update**”

**Instructor:** Dennis J. Gerschick

**Code:** ITU