THOMSON REUTERS
CHECKPOINT™

Checkpoint® Individual Tax Planning Package

What are the best options for funding retirement? Could you provide some effective charitable giving strategies? These are just some of the questions you'll need to have answers for.

You'll be able to address individual tax planning needs, including retirement funding options and charitable giving strategies, as well as funding education, estate planning and divorce with the Thomson Reuters Checkpoint™ Individual Tax Planning Package.

You'll also get tax-saving strategies for self-employed individuals including reducing self-employment tax, employing family members, choosing retirement plans and home offices.

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INDIVIDUAL TAX PLANNING TOPICS	
Tax Planning for High Income Individuals	✓
Self-Employed Individuals	✓
Retirement Planning	✓
Individual Retirement Accounts	✓
Practical Estate Planning	✓
Charitable Giving Strategies	✓
Divorce Taxation	✓
Life Insurance Strategies	✓
NEWS UPDATES	
Federal Tax Update, EY Tax Alerts, Tax Watch, News and Insight, PPC's Five-Minute Tax Briefing	✓
PRIMARY SOURCE MATERIAL	
Comprehensive primary source materials include AFTR, Tax Court and Board of Tax Appeals Decisions, Citation Tracker, and more	✓
PRODUCTIVITY TOOLS AND RESOURCES	
Answer Path: Quick Topic Orientation, Quick Tax Amounts	✓
Form/Line Finder: Individual, Corporation, Partnership, Estate and Trust Income, Gift (and GST), Estate (and GST), Exempt Organization, and Employee Benefit Plan Returns	✓
Calculators: Auto, Business, Credit Card, Investment, Loan, Mortgage, Personal, Retirement, Savings, Tax	✓
Interactive Decision Tools	✓
Federal Tax Handbook	✓
Federal Depreciation Handbook and Calculator	✓
Community: Secure, Online Community Exclusively for Tax and Accounting Customers of Thomson Reuters	✓

the answer company™
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This package includes:

INDIVIDUAL TAX PLANNING TOPICS

- Tax Planning for High Income Individuals
  - Residences and vacation homes
  - Sole proprietors and other business owners
  - Executive compensation
  - Stocks, bonds, real estate, and other financial investments
  - Funding college costs
  - Charitable giving
  - Divorce
  - Retirement plans
  - Special situations
- Self-Employed Individuals
  - Operating a business from the owner's residence
  - Compensating family members and fringe benefit issues
  - Retirement plans for the self-employed individual
  - Loss limitations affecting self-employed individuals
  - Minimizing self-employment tax
  - Disposing of a proprietorship
- Retirement Planning
  - Step-by-step planning approach
  - Cash flow planning
  - Investments
  - Income tax considerations
  - Social Security benefits
  - Retirement plans
  - Planning for incapacity
  - Life insurance planning
  - Asset protection strategies
  - Medicare and other health care funding
  - Long-term care and Medicaid funding
- Individual Retirement Accounts
  - A model for tax and financial planning engagements
  - Dealing with Traditional IRAs
  - Dealing with Roth IRAs
  - Dealing with SEPs, SARSEPs, SIMPLE IRA Plans, Payroll Deduction IRAs and my RAs
  - Comparing types of IRAs
  - Planning for distributions
  - Planning for rollovers
  - Designating a beneficiary
  - Dealing with compliance
  - Fitting IRA assets into an estate plan
- Practical Estate Planning
  - Wealth transfer planning
  - Transfers of business interests
  - Valuation issues
  - Transfers: generation-skipping, marital, charitable transfers
  - Life insurance and liquidity
  - Retirement plan distributions
  - Elder care, incapacity and terminally ill, postmortem estate planning
  - Reviewing wills, trusts, and other documents
- Charitable Giving Strategies
  - Deducting charitable contributions for income tax
  - Charitable remainder trusts
  - Charitable lead trusts
  - Private foundations and alternative charitable entities
  - Pooled income funds
  - Charitable gift annuities
  - Gift of an interest in a personal residence or farm
  - Charitable contributions of qualified conservation easements
  - Deducting charitable contributions for estate and gift tax
- Divorce Taxation
  - Divorce engagements in a tax practice
  - Structuring alimony and child support payments
  - Transferring property in divorce
  - Planning for the marital home
  - Splitting retirement plans
  - Tax return filing issues
- Life Insurance Strategies
  - Evaluating life insurance needs
  - Analyzing, comparing, and selecting life insurance coverage
  - Taxation of life insurance
  - Strategies for individuals
  - Life insurance as an employee benefit
  - Life insurance for business risks and succession planning

NEWS UPDATES

- Federal Tax Update
- EY Tax Alerts
- Tax Watch
- News and Insight
- PPC's Five-Minute Tax Briefing

PRIMARY SOURCE MATERIAL

You'll have access to a comprehensive collection of primary law materials, including the Internal Revenue Code, IRS/Treasury regulations, IRS rulings and releases, cases, congressional pending and enacted legislation and committee reports – plus archives.

PRODUCTIVITY TOOLS AND RESOURCES

- Answer Path (exclusive)
- Form/Line Finder (exclusive)
- Calculators
- Interactive Decision Tools
- Federal Tax Handbook
- Federal Depreciation Handbook and Calculator
- Community

EXCLUSIVE TO CHECKPOINT

- Scheduled Searches
- Superior Linking
- Superior Code History
- Prior Regulations
- Flagged Documents
- Filter Links
- Bill Tracker
- Citation Tracker
- Links to related Checkpoint Learning® courses in context of analysis

TRAINING COURSES

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