

Hawaii Association of Public Accountants
INDIVIDUAL TAX UPDATE
Qualifies for 8 Hours CPE

Individual Tax Update *with Steve Dilley*

Option 1: November 30 & December 1, 2023 – 9:00 am – 12:45 pm (each day)

Option 2: December 12 & 13, 2023 – 9:00 am – 12:45 pm (each day)

Description:

This program provides an update to the latest tax developments, rules and regulations affecting individual taxpayers, including a review and integration of late 2022 and 2023 legislation.

Learning Objectives:

After attending this course, you will be able to:

- Apply the latest provisions and developments, rules and regulations impacting individual taxpayers
- Implement practical strategies based on recent developments
- Identify and recall key compliance issues and changes in tax forms

Major Subjects:

- Inflation Reduction act related tax developments – energy credits, Obamacare, and other individual provisions
- SECURE Act 2.0 retirement legislation and other late 2023 legislative developments
- **Detailed coverage of Hawaii’s Flow-through Entities tax with examples and official pronouncements**
- Update on capital gains, Section 199A and passive loss activity
- Virtual currency reporting
- 2023 Tax rates and schedules
- Individual credits (dependent care credit, child tax credit, earned income credit, premium tax credit)
- Gross income and Deductions **(including personal and business casualty loss provisions)**
- Forms update
- Partner’s foreign income – Schedules K-2 and K-3 requirements (update for 2023)
- Implications of forms changes
- Financial accounting vs. tax accounting for selected topics

Who should attend: CPAs and members in industry seeking a legislative update on the most recent individual tax provisions.

Program Level: Intermediate

Prerequisite: Basic working knowledge of individual taxation.

Advanced preparation: None

Developer: Federal Tax Workshops, Inc.

Leader: Steven C. Dilley, CPA, JD, PhD

Recommended CPE Credit: 8 hours Taxation

REGISTER ONLINE@ www.haopa.wildapricot.org

Questions re Webinar or Online Registration? – contact Eric Matsuda, CPA at e.matsuda2@hawaiiantel.net or telephone (808) 949-7651

Alternatively, please register by mailing in registration form and check below:

HAWAII ASSOCIATION OF PUBLIC ACCOUNTANTS – INDIVIDUAL TAX UPDATE REGISTRATION FORM

FIRM _____ Phone: _____ Contact Person _____ Fax: _____
ADDRESS _____ Email Address _____
Participant _____ E Mail _____ PTIN# _____
Participant _____ E Mail _____ PTIN# _____
Participant _____ E Mail _____ PTIN# _____
Participant _____ E Mail _____ PTIN# _____

Circle Session Attending – Option 1 (November 30 & December 1, 2023)

Option 2 (December 12 & 13, 2023)

Registration

HAPA Member-----\$220.00 @ _____ = \$ _____

Non Member -----\$295.00 @ _____ = \$ _____

Total Amount Enclosed----- \$ _____

Please furnish details of participants for the seminar above. Please note: there is a 100 participant limit for each webinar, so please register early. Thank you.

Cancellation policy: No refunds for cancellation within 3 days prior to the seminar date.

MAIL YOUR CHECK MADE PAYABLE TO “HAWAII ASSOCIATION OF PUBLIC ACCOUNTANTS” ALONG WITH YOUR REGISTRATION FORM TO:

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