**Course Outline**

**Course Title & Author 2024 Best Tax Planning & Retirement Ideas for Individuals Robert Jennings CPA,**

**Credit Hours 8**

**Publication Date March 3, 2024**

**Topic Minutes**

Introduction, bracket & Rate analyses 30

W-2 Employees

 Benefits analyses 10

 Accountable plans with example 10

 Retirement Plans 10

 Dependent Care, Cafeteria Plans 20

 Health Savings Accounts 10

 Other Planning Tips 10

Break

Tips for all Taxpayers

 Elections 20

 Deductions 30

 Investments 10

 Credits and alternative tax treatments 30

 Detailed rate analyses with examples 10

Lunch

Retirement Tips and Tools

 QCD’s 10

 60 Day rollover waiver 10

Credits and other planning tips 40

 10% Penalty exceptions and planning 40

Break

Estate & Gift Planning Tools 50

Trusts and Special Topics 20

Business Owner Planning 40

Planning for Loss Years 10

 TOTAL 420