**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