



2023 MTAP Education Seminars

Virtual Events Featuring GEAR UP Seminars

Complete Online Listings and Registration Information

Available at www.michigantap.net/education

GEAR UP Preparation of Forms 1041, 706 and 709

A Great Tax Preparation Primer for Expanding into This Growing Service

September 19, 2023 (Tuesday) 10:00 am – 1:40 pm ET * 4 CPEs in Taxation (federal tax education)

Seminar Fees

Active and Associate Members \$110	Education Members \$110
Member Employees \$137	Non-Members \$160

Our clients are aging and the need for estates services continues to grow. As 1040 income continues to decrease with free and inexpensive online options for taxpayers, growing services in more specialized areas is essential. GEAR UP's Brian Eisenmenger provides form preparation walkthroughs of basic and intermediate case studies for federal 1041, 706 and 709 forms. This is an excellent primer for practitioners who have done no or little estates preparation work and a nice refresher for those who have done some work in this area. It's a great way to build or grow this service within your practice.

[Learn More and Register Now](#)

Helping Business Clients Through Difficult Times

Managing Vital Post-pandemic Financial Management Challenges

September 26, 2023 (Tuesday) – 10:00 am – 5:40 pm ET * 8 CPEs in Taxation (federal tax education)

Seminar Fees

Active and Associate Members \$170	Education Members \$170
Member Employees \$197	Non-Members \$220

The pandemic brought many unexpected challenges for small businesses, and now those who survived are still struggling to recover. GEAR UP's Rick Oelerich and Tim Sundstrom provide an in depth 8 hour seminar that focuses on the financial management issues facing small business from financial statement analysis to developing and executing meaningful business plans. Attendees will learn about diverse business financing options, debt restructuring, leasing vs. purchasing analysis, how to cancel debt, protecting owners from creditor claims, and debt restructuring. It is supplemented with several case studies that reinforce concepts and management techniques you can use.

[Learn More and Register Now](#)

Handling Post-Pandemic Retirement Issues

Insuring Your Clients are Prepared to Maximize This Next Step in Life

October 24, 2023 (Tuesday) – 10:00 am – 1:30 am ET * 4 CPEs in Taxation (federal tax education)

Seminar Fees

Active and Associate Members \$95	Education Members \$95
Member Employees \$122	Non-Members \$145

As the nation comes out of the pandemic, many workers have retired or are considering retirement in the near future. GEAR UP's Tim Sundstrom to review the important aspects of making the decision to retire including Social Security, Medicare, and retirement plan management using case studies to illustrate how practitioners can effectively analyze a client's situation, counsel clients on the many aspects of retiring, and providing insights on growing this service in your practice.

[Learn More and Register Now](#)

Navigating the New IRS

Making Your Interactions More Efficient and Effective

October 24, 2023 (Tuesday) – 2:00 – 5:40 pm ET

4 CPEs in Taxation (federal tax education)

Seminar Fees

Active and Associate Members \$90	Education Members \$90
Member Employees \$117	Non-Members \$140

As we all know, the IRS is making sweeping changes in how they administer the most complex tax system in the world. With a multi-billion dollar investment from Congress, the Service is fast converting as much of its service to electronic access and delivery as possible. GEAR UP's Rick Oelerich, a longtime expert in IRS operations, will show attendees what is changing, when these changes will take place, and how practitioners can effectively navigate the changing system to insure their clients are fully represented. He will show how to adapt operations to optimize interactions with the internet-based services, and discuss technology upgrades you should consider to monetize this service to clients.

[Learn More and Register](#)

GEAR UP Business Entities Seminar

The Nation's Best Business Tax Update Seminar

October 25, 2023 (Wednesday) – 8:00 am – 4:15 pm ET

8 CPEs in Taxation (4 CPEs in tax law update; 4 CPEs in federal tax education)

Seminar Fees

Active and Associate Members \$180	Education Members \$180
Member Employees \$207	Non-Members \$230

The GEAR UP Business Entities Virtual navigates through all of the federal tax changes, administrative actions, court decisions, and other developments that impact your business clients, along with analysis to insure you can effectively counsel clients on their reporting and tax management options. It also reviews how applicable entities can provide tax minimization and management advantages based on the business type. The session also provides multiple opportunities to confidentially ask questions on those unique and not-often managed business tax issues to insure your clients are in full compliance. Presentations are supported by a PDF of the 700-plus page reference guide that you can use and reproduce if you so choose (paper copies are available at an additional cost of \$50; simply select the option on the fee selection page of your online registration)

[Learn More and Register](#)

GEAR UP 1040 Tax Seminar

No Federal 1040 Seminar Prepares You Better for Tax Season!

Date Options Below – 8:00 am – 4:15 pm ET (each day)

14 CPEs in Taxation; 2 CPEs in Ethics

New for 2023: You can choose between 3 dates for each day of the seminar to best fit into your schedule AND break up sitting for two consecutive days. **This year's date options** (you must select one date from Section A-B and one date from Section C-D):

Section A-B (8 hours)

November 8 (Wednesday)
November 16 (Thursday)
December 6 (Wednesday)

Section C-D (8 hours)

November 9 (Thursday)
November 17 (Friday)
December 7 (Thursday)

GEAR UP 1040 Seminar Fees

Active and Associate Members \$309 Education Members \$309
Member Employees \$336 Non-Members \$359

The two-day GEAR UP 1040 Virtual Seminar navigates through all 2023 federal tax changes and applicable prior year changes, IRS guidance and administrative actions, court decisions, and any developments that impact advising 1040 clients and preparing their returns. Presenters who do exactly what you do - prepare taxes - provide expert analysis to insure you can effectively counsel clients on their reporting and tax management options. GEAR UP 1040 presentations are supported by a PDF of the 700-plus page reference guide for use during the sessions, along with any available presenter slides or aids elaborating on the presentations. **For an additional \$50 fee**, registrants can order a paper copy of the workbook housed in a 3-ring binder that is delivered in advance of your first day presentation.

[Learn More and Register](#)

GEAR UP Last Minute Tax Update

Insure No 'Last Minute' Changes Slip By and Ask Those Questions!

January 10, 2024 (Wednesday) – 8:00 am – 11:45 am ET * 4 CPEs in Taxation (tax law update)

Seminar Fees

Active and Associate Members \$100 Education Members \$100
Member Employees \$127 Non-Members \$150

This last-minute federal tax update covers all late-breaking business and individual tax measures that impact the management and filing of federal returns during tax season. It includes any legislation passed during the December lame duck session of Congress; late year administrative developments and last-minute guidance issued by SBA, U.S. Treasury or the IRS. And most importantly, presenters address your 'last minute' questions during the seminar!

[Learn More and Register](#)

Questions? Call MTAP at 517-641-7505 or email staff@michigantap.net

Registering 4 or More People from the Firm? Call and let MTAP do it for You!