

Understanding Borrowers' Tax Returns, Part 1: Basics, Itemized Deductions, Interest & Dividend Income & Sole Proprietorships (Schedule C)

WEBINAR OR ON-DEMAND WEB LINK
(LINK INCLUDES FREE CD ROM)

Thursday, January 26, 2012

12 - 1:30 pm PT
1 - 2:30 pm MT
2 - 3:30 pm CT
3 - 4:30 pm ET

It's a tough lending environment. Understanding the true cash flow of borrowers is as important today as it has ever been. This webinar will help take the mystery out of borrowers' personal income tax returns. No more guessing how much income your borrower is really earning. Learn how to identify actual cash flow quickly and reliably.

Usually cash flow and taxable income are different. You can't afford to rely on any income that is not actually being received. Nor can you afford to deny loans to borrowers who earn more than their tax returns show. Overestimating the income from a tax return can lead you to approve a weak loan that could eventually cost you tens of thousands of dollars. Underestimating income on a tax return can lead you to deny good loans that you need to grant in this tough market. This session will make the process of analyzing personal income tax returns simple and understandable.

Continuing Education: Attendance verification for CE credits provided upon request.



HIGHLIGHTS

- Understanding recurring versus non-recurring when considering incomes or losses
- Schedule B Interest & Dividends: Identify recurring/non-recurring interest and dividend income
- Schedule B Interest and Dividends: Root out pass-through interest and dividend income from Partnerships or S Corporations
- Schedule C Sole Proprietorship: Learn to recognize 4 forms of hidden income and 1 hidden expense

DON'T MISS PART 2!

This program is the first of two in a series. Watch for
**"Understanding Borrowers' Tax Returns, Part 2:
Income from Rentals, Royalties, Partnerships, S Corps & Farms"**
on Wednesday, February 29, 2012.

WHO SHOULD ATTEND?

This informative session is designed for anyone in the lending area including chief lending officers, CSRs, new accounts personnel, loan officers, loan underwriters, credit analysts, loan processors, branch managers, CEOs, and other key lending staff.

MEET THE PRESENTER

**Tim Harrington, CPA,
TEAM Resources**



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