

What is that Personal Tax Return Telling Me? Form 1040, Schedules B, C, & D

WEBINAR – ON-DEMAND WEB LINK & FREE CD ROM

Thursday, February 11, 2010

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

With the current economy, understanding the true cash flow of borrowers is important. This webinar will help take the mystery out of borrowers' personal income tax returns. Take the mystery out of borrowers' 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. 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. Conversely, underestimating income on a tax return can lead you to deny good loans that your bank and your customer needs in this tough economy. This program will include many examples and will make the process of analyzing tax returns remarkably simple.

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



HIGHLIGHTS

- **Schedule B Interest & Dividends:** Identify recurring/non-recurring interest and dividend income
- **Schedule C Sole Proprietorships:** Recognize 4 forms of hidden income and 1 hidden expense
- **Schedule D:** Decipher income that won't be received in the future and shouldn't be considered
- **Forms 6252 and 4797:** How to identify hidden income from installment sales

WHO SHOULD ATTEND?

This informative session is designed for anyone in lending, 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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