



# Tax Return Analysis

September 27, 2017 ▪ 9:00am - 4:00pm

The Bankers Center ▪ Baton Rouge, LA

This program will cover both personal and business tax returns. We will take a look at small business and self-employed borrowers. Cash flow and global debt analysis will be covered. The primary focus will be on converting taxable income into effective income. The program will cover:

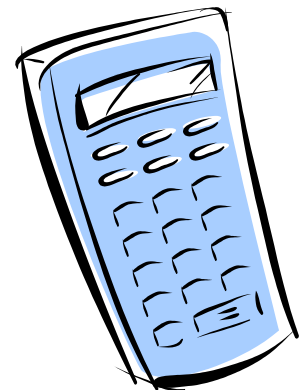
- Sole Proprietorships
- Partnerships and LLCs
- Corporations
- Sub Chapter - S Corporations

Other topics to be covered include:

- Evaluating Rental Income
- Interest and Dividend Income
- Capital Gains and Losses
- Commission Income Earners

The class will employ lecture and case studies.

*Each participant should bring a standard, basic (non-financial) calculator*



## Who Will Benefit

Credit Analysts, Lenders, Loan Review Officers, Auditors, and any employee responsible for analyzing customers' tax returns

## Registration Fee

\$250, per LBA member  
\$450, per non-members

## Workshop Instructor



**David L. Kemp** is president of Bankers Management, Inc. formerly The Management Group. Prior to forming BMI, he served as vice president, director of credit services for Canon Financial Institute in Athens, Georgia. His areas of expertise include commercial lending, consumer lending, workouts, and director responsibilities.



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## Registration Form

*(For additional registrations, please make copies.)*

### Registrant 1

Mr./Mrs./Ms. \_\_\_\_\_  
 Bank \_\_\_\_\_  
 Email Address \_\_\_\_\_  
 Branch Street Address \_\_\_\_\_  
 City, State, Zip \_\_\_\_\_  
 Phone \_\_\_\_\_  
 Fax \_\_\_\_\_

### Registrant 2

Mr./Mrs./Ms. \_\_\_\_\_  
 Bank \_\_\_\_\_  
 Email Address \_\_\_\_\_  
 Branch Street Address \_\_\_\_\_  
 City, State, Zip \_\_\_\_\_  
 Phone \_\_\_\_\_  
 Fax \_\_\_\_\_

### Payment Options

Check (Made payable to the Louisiana Bankers Association)

Visa       MasterCard       American Express

Card # \_\_\_\_\_ Expiration Date \_\_\_\_\_

Credit Card Billing address \_\_\_\_\_

Name on Card (Please Print) \_\_\_\_\_

Signature \_\_\_\_\_ Amount to be Charged on Card \$ \_\_\_\_\_

- I am unable to attend. Please send me \_\_\_\_\_ copies of the manual for :
  - \$175 (member fee)
  - \$375 (non-member fee) (includes shipping and handling)

**\*Manuals will be shipped after the seminar.**

### Registration Fee

\$250, per LBA member  
 \$450, per non-member

This training will be covered under SBET (Small Business Employee Training Program). Please provide an email address on the line below to receive the necessary documentation for reimbursement:

\_\_\_\_\_

**\*Please note: Manuals not eligible for SBET funding.**

### Location

The Bankers Center  
 5555 Bankers Avenue  
 Baton Rouge, LA 70808  
 Phone: 225-387-3282  
 Fax: 225-343-3159

### Registration Fee

\$250, per LBA member  
 \$450, per non-member

### Agenda

8:45 a.m. Registration  
 9:00 a.m. Program Begins  
 12:00 p.m. Lunch  
 4:00 p.m. Program Adjourns

### Cancellation Policy

Due to commitments we must make to secure a class, we need your help. If you must cancel your registration, please do so at least 3 business days prior to the seminar date to avoid a \$125 cancellation fee. Any registrant who does not cancel will be billed the full registration fee and sent the manual. Substitutions are welcome at no additional charge.

### Hotel Information

Residence Inn by Marriott - Towne Center at Cedar Lodge  
 7061 Commerce Circle, Baton Rouge, LA 70809.  
 For reservations, call (225) 925-9100 and ask for the "Louisiana Bankers Association special room rate of \$122."

**Submit registration and view rosters in the  
 Education Section of LBA's Website, [www.lba.org](http://www.lba.org).**