



Tax Return Analysis (Virtual)

March 12, 2021 ▪ 9:00am - 4:00pm

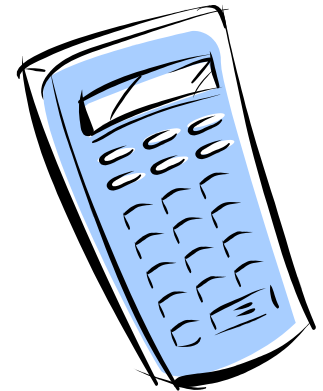
Virtual Live Seminar or Seminar Recording Available

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 LLC's
- 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 to work through the exercises.

Who Will Benefit

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

Registration Fee

Member Fee (Virtual Live Seminar or Virtual Seminar Recording): \$265
Non-Member Fee (Virtual Live Seminar or Virtual Seminar Recording): \$465

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

Registrant 1

Mr./Mrs./Ms. _____

Bank _____

Email Address _____

Branch Street Address _____

City, State, Zip _____

Phone _____

Cell _____

Please check: Virtual Live Seminar Seminar Recording

Registrant 2

Mr./Mrs./Ms. _____

Bank _____

Email Address _____

Branch Street Address _____

City, State, Zip _____

Phone _____

Cell _____

Please check: Virtual Live Seminar Seminar Recording

Please note: If you participate in the live virtual seminar, we will email a certificate to you following the program. Certificates will only be emailed to registered attendees. If you opt for the recording, we will not be able to provide a certificate because we will not be able to track attendance.

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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 \$ _____

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: Recording not eligible for SBET funding.**

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Agenda

9:00 a.m. Program Begins

12:00 p.m. Lunch Break

4:00 p.m. Program Adjourns

Submit registration and view rosters in the Education Section of LBA's Website, www.lba.org.