



## 2020 Tax Season Staff Meeting Agenda

- REVIEW NEW FORM 1040
- REVIEW TAX SOFTWARE MANUAL
- SEARCH FOR AMT CREDIT CARRYOVERS
- DISCUSS CHANGES IN REVIEW PROCESS DUE TO NEW FORM 1040
- DISCUSS NEW VIRTUAL CURRENCY AND FOREIGN ASSET QUESTIONS
- REVIEW NEW INSTRUCTIONS FOR FORMS 1120S AND 1065
- REVIEW REQUIRED ELECTIONS AND LOCATE THE SOFTWARE INPUT SHEET FOR EACH
- REVIEW AVAILABLE OFFICE SOFTWARE TO STREAMLINE THE PREPARATION OF 2020 W-4S
- ESTABLISH AND UPDATE OFFICE RULES FOR SEEING DOCUMENTATION
- UPDATE AND REVIEW RECORD RETENTION POLICY FOR THE OFFICE AND FOR THE CLIENT
- REVIEW NEW QBI DEDUCTION FORMS
- REVIEW ACA PROVISIONS
- REVIEW DUE DILIGENCE FORM 8867
- REVIEW RETROACTIVE EXTENDER PROVISIONS AND PENSION AND IRA REFORM CHANGES INCLUDED IN NEW LAST-MINUTE TAX LEGISLATION

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