

PRACTITIONER'S REFERENCE SHEET

(December 2017)

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EDUCATE EMPLOYEES ON REQUIRED MINIMUM DISTRIBUTION RULES (PAGE 1):

References:

PPC's Guide to Tax Planning for High Income Individuals.

PPC's Guide to Individual Retirement Accounts.

DAPTS OFFER A HOMEGROWN APPROACH TO ASSET PROTECTION (PAGE 2):

Reference:

PPC's Guide to Uses and Taxation of Trusts.

5 COMMON MISTAKES WHEN APPLYING FOR FINANCIAL AID (PAGE 3):

References:

PPC's Guide to Tax Planning for High Income Individuals.

FAFSA.ed.gov.

ENSURING YOUR YEAR-END DONATIONS ARE TAX DEDUCTIBLE (PAGE 4):

References:

PPC's 1040 Deskbook.

PPC's Guide to Charitable Giving Strategies.

IRS Pub. 526, "Charitable Contributions."

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