

PRACTITIONER'S REFERENCE SHEET

(May 2018)

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DO YOU HAVE YOUR OWN WEALTH MANAGEMENT PLAN? (PAGE 1):

References:

PPC's Guide to Personal Financial Planning.
PPC's Guide to Practical Estate Planning.

CHOOSING BETWEEN A CALENDAR TAX YEAR AND A FISCAL TAX YEAR (PAGE 2):

References:

PPC's 1120 Deskbook.
PPC's 1120S Deskbook.
PPC's 1065 Deskbook.

GET AN EARLY TAX "REFUND" BY ADJUSTING YOUR WITHHOLDING (PAGE 3):

References:

PPC's Payroll Tax Deskbook.
PPC's 1040 Deskbook.
PPC's Guide to Compensation and Benefits.

FOREIGN ACCOUNTS CALL FOR SPECIFIC REPORTING REQUIREMENTS (PAGE 4):

References:

PPC's 1040 Deskbook.
PPC's Guide to Dealing with the IRS.

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