PRACTITIONER'S REFERENCE SHEET (October 2018)

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Are You a Member of the Sandwich Generation? (Page 1):

References:
PPC's Guide to Retirement Planning.
PPC's Guide to Practical Estate Planning.

Avoid Penalties by Abiding by the NQDC Tax Rules (Page 2):

References:
IRC Sec. 409A.
PPC's Guide to Compensation and Benefits.

Tax Calendar (Page 2):

Reference:
IRS Pub. 509, *Tax Calendars*.

DOL Has Increased Scrutiny of Defined Benefit Plans (Page 3):

Reference:
N/A.

Catching Up With the Home Mortgage Interest Deduction (Page 4):

References:
IRC Sec. 163(h)(3).
PPC's Guide to Tax Planning for High Income Individuals.

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