

# Client Handouts Catalog

Use handouts to explain tax concepts to your clients, promote your practice, and help your clients stay organized. Handouts cover a huge variety of tax-related subjects and are written in an easy-to-read format your clients will appreciate. Build customer loyalty and keep your name in front of your clients year round!

Tax Materials, Inc offers over 100 different client handouts including eight new handouts addressing the Tax Cuts and Jobs Act.

## Eight Tax Cuts and Jobs Act Handouts

- Tax Cuts and Jobs Act - Corporations
- Tax Cuts and Jobs Act - Depreciation
- Tax Cuts and Jobs Act - Employers
- Tax Cuts and Jobs Act - Excess Business Loss and Net Operating Loss (NOL)
- Tax Cuts and Jobs Act - Individuals
- Tax Cuts and Jobs Act - New Business Income Deduction
- **New Tax Law**
- Tax Cuts and Jobs Act - Retirement and Other Savings Accounts
  
- 2018 Tax News and Industry Updates - Volume 6, Issue 1 (Released February 2018)
- 2018 Tax News and Industry Updates - Volume 6, Issue 2 (Released April 2018)
- 2018 Tax News and Industry Updates - Volume 6, Issue 3 (Released September 2018)
- Alternative Minimum Tax
- Audits
- Business Entity Comparison Chart
- Business Entity Pros and Cons
- **Business Expenses Worksheet**
- Business Financing - Don't Intermingle Funds
- Business Management Tips
- Business Owners - Taking Money Out of a Business
- Business Use of Home
- Buy-Sell Agreements
- C Corporation Tax Organizer (Tax Year 2017)
- **Cancellation of Debt - Insolvency**

If you do not see the specific handout in the Dropbox folder, please click on the green hyperlink----> [Contact Me](#) website page to request a handout.

- Capital Gains and Losses
- Charitable Cash Donation Tracker
- **Charitable Contributions Guide**
- **Charitable Noncash FMV Guide**
- Clergy - Religious Workers
- College Financial Aid Planning
- Consumer Credit
- Corporation Meeting Requirements
- Crowdfunding
- Day Care Providers Income and Expenses
- Death of a Taxpayer
- Dependent Support Worksheet
- Divorce and Taxes
- Early Retirement Distributions - SEPP
- **Education Tax Benefits**
- **Employee or Independent Contractor**
- Estate Planning, Wills, Probate, and Transfer of Assets
- Estate Tax (Form 706)
- Estimated Taxes
- Expense Reimbursements for Employees
- **Families With Children**
- Farm Expenses Worksheet
- Farm Income Worksheet
- Farm Inventory and Accounting Methods
- Farm Vehicles and Fuels
- **Filing Status**
- Financial Planning Guide
- Foreign Bank and Financial Accounts
- Form 1099-MISC, Miscellaneous Income Reporting
- Fringe Benefits
- Gambling Log
- General Engagement Letter for Individual Tax Preparation (Tax Year 2017)
- Gift Tax
- Health Care Organizer (Tax Year 2017)
- Health Care Reform - Cost Sharing Subsidy for Individuals with High-Deductible Plans
- Health Care Reform - Employer Insurance Requirement
- Health Care Reform - Individual Insurance Requirement
- Health Care Reform - Premium Assistance Credit
- Health Care Reform - State Health Insurance Exchanges
- Health Savings Accounts (HSAs)
- High-Income Taxpayers
- Hobby vs. Business
- Household Employees

- Identity Theft and Your Taxes
- Individual Retirement Accounts - Backdoor Roth IRA
- Individual Retirement Accounts - Inherited IRAs
- Individual Retirement Accounts - Kinds of IRAs and Prohibited Transactions
- Individual Retirement Accounts - Qualified Charitable Distribution (QCD)
- Individual Retirement Accounts - Required Minimum Distributions (RMDs)
- Individual Retirement Accounts - Roth IRAs
- Individual Retirement Accounts - Traditional IRAs
- Individual Taxpayer Organizer - Rental Property (Tax Year 2017)
- Individual Taxpayer Organizer - Sole Proprietorship (Tax Year 2017)
- **Individual Taxpayer Organizer (Tax Year 2017)**
- Inventory Cost of Goods Sold
- Itemized Deductions - Casualty and Theft Losses
- Itemized Deductions - Homeowners
- Itemized Deductions - Interest Paid
- **Itemized Deductions - Medical Expenses**
- Itemized Deductions - Taxes Paid
- Kiddie Tax
- Limited Liability Companies (LLCs)
- LLC Tax Organizer (Tax Year 2017)
- Marketing Your Business
- **Mileage and Expense Log**
- Moving Expenses
- Moving Out Worksheet
- Multi-State Taxation
- Newlyweds Tax Tips
- On-Demand Drivers
- Partnership Tax Organizer (Tax Year 2017)
- Partnerships
- Pension Income Planning
- Real Estate Professionals
- Recordkeeping for Tax Purposes
- Referrals Appreciated
- Rental Income and Expense Worksheet
- Rental Income and Expenses
- Repairs vs. Improvements
- Retirement Income
- Reverse Mortgages
- S Corporation Tax Organizer (Tax Year 2017)
- S Corporations
- Sale of a Principal Residence
- Same-Sex Married Couples
- Saving for College

- Saving for Retirement
- Self-Employment Tax
- Short-Term Rentals
- Small Business Health Care Tax Credit
- Social Security and Medicare
- Standard vs. Itemized Deduction
- Starting a Business
- Stock Options - Same Day Sales
- Tax Cuts and Jobs Act - Corporations
- Tax Cuts and Jobs Act - Depreciation
- Tax Cuts and Jobs Act - Employers
- Tax Cuts and Jobs Act - Excess Business Loss and Net Operating Loss (NOL)
- Tax Cuts and Jobs Act - Individuals
- Tax Cuts and Jobs Act - New Business Income Deduction
- Tax Cuts and Jobs Act - Retirement and Other Savings Accounts
- Tax Facts and Figures
- Tax Scams - Protect Yourself
- Taxable Social Security Benefits
- Taxpayers Who Receive an IRS Notice
- Tipped Employees
- Vehicles - Business Use
- What Should You Do if You Can't Pay Your Taxes?
- Withholding - Filling Out Form W-4