Global Tax Return Analysis Training
Say "YES" to good loans!

- (Re)learn the fundamentals to find all cashflow
- Spot and resolve red flags to avoid problem loans
- Dig for dollars to find nonrecurring or noncash addbacks
- Ask good questions to get the story behind the numbers
- Make good decisions on loan and restructure requests

November 12th and 13th, 2014
Anaheim, CA

Class-size limited to 25! Register now to claim your spot.

lindakeithcpa
Helping Lenders say "Yes" to good loans!

"Linda has a very unique way of teaching that ensures lenders of all levels are able to understand and gain additional knowledge in the area of tax return analysis. I highly recommend Linda's courses ."

Dawn H. Barr Tata, Senior Credit Analyst
Mutual of Omaha Bank, Colorado

What you'll learn:

Tax Return Analysis: Essentials and 1040 Review

- Understand Global Cashflow Analysis
- Translate taxable income into cashflow
- Find hidden income
- Spot troubled businesses
- Ask good questions
- Learn which forms to safely ignore
- Complete two case-studies in class
- Take back a 190+ page workbook/reference manual

Beyond the 1040: Corporations, Partnerships & LLCs

- Learn the tax forms
- Know what a K-1 does and does not tell you
- Decide when you need more than the K-1
- Understand NOL's, LLC's and Passive Losses
- Recognize the risk exposure of the LLC Members, General Partners & Corporate Shareholders
- Create a Global Analysis of Business and Guarantor(s)
- Take back a 190+ page workbook/reference manual

What lending professionals say:

"Excellent working knowledge of lender requirements and needs."

Ken Austad, Vice President
Silvergate Bank, California

"The course had layers of difficulty allowing for basic information and more advanced. There is nothing needing improvement."

Eric Jones, Banking Officer
First Bank, Colorado

"After attending Linda's session, I feel more comfortable with what is needed to help our self-employed members with their lending needs. Her session was upbeat and entertaining."

Shelly Ridgeway, AVP of Lending
Ascentra CU, Iowa

"Linda really sorts out confusing and complex returns so everyone can understand what is going on and explain it."

Liz Hoffman, Commercial Credit Analyst
Whidbey Island Bank, Washington

About Linda:

Linda G. Keith CPA CSP

Linda works with banks and credit unions to develop consistent, clear guidelines and tools for loans to businesses and their owners. Her training helps lenders make good loans and make more of them.

Experienced as a Washington State Examiner, in public accounting and tax practice, and as a business consultant/trainer, her focus since 1986 has been loan quality and credit analysis.

A real estate investor and co-owner of a construction firm, Linda's experience as a mortgage and commercial borrower of long-standing provides real-life stories of the essential principles she shares.

Linda is Certified ^{squared}. She is one of ten CPA/CSPs in the country. The National Speakers Association awards the Certified Speaking Professional (CSP) designation for proven, extensive presentation experience.

See Linda training lenders at bit.ly/1j6XWlk. (This URL is case sensitive.)

Workshops: Come to Class

This workshop is open to lenders from throughout the area, a great way to compare notes with others. Join us for this one-time local session, save travel money and get the training now! *As little as $770 per person for both days. The more you send the more you save.*

Agenda

Day I: Tax Return Analysis - Essentials and 1040 Review

8:00	Registration and Coffee
8:30	Types of Adjustments, Procedures, Worksheets, Form-by-form & Line-by-line Emphasis on Sole Proprietorship – Historical and Recurring Cashflow
Noon	Lunch
1:00	Emphasis on Capital Gains and Rentals
3:30	In class case-studies done in small groups allow participants to clear up any confusion and reinforce concepts learned in class.
5:00	Adjourn

Day II: Beyond the 1040 - Corporation, Partnership & LLC Returns

8:00	Registration and Coffee
8:30	Description; Advantages/Disadvantages; Forms filed; Tax impact on borrower; Considerations for lender; Form review; Case Study Corporations
Noon	Lunch
1:00	General and Limited Partnerships Limited Liability Companies S Corporations Discussion of passive versus non-passive
5:00	Adjourn

www.LindaKeithCPA.com or call 360.455.1569 for more information.

Who Should Attend

- Commercial Lenders
- Business Development Officers
- Consumer Lenders
- Credit Officers
- Branch Managers
- Internal Auditors
- Mortgage Lenders
- Loan Processors
- Underwriters

Bring a calculator, highlighter and pencil.... you'll use them!

Register Now!

Step One: Select your number of participants
The fee includes both days of instruction and manuals:

1-3: $990@ 4+: $770@

Step Two: Register for class

1. Go to www.LindaKeithCPA.com
2. Click on the 'Programs' link at the top of the page
3. Click on the 'In-Person Training' link at left
4. Scroll to the Program City and Dates you want
5. Click on 'Register Online' or 'Register by Mail or Request Invoice'
6. Follow instructions for your registration choice

Step Three: Tell us who is coming

Send an email with the list as soon as you register or include the information with your invoice request. We need names, positions and email addresses to send them the pre-work, workshop reminder and their certificate upon completion.

Location

Anaheim| Paradise Pier Hotel
1717 S. Disneyland Drive
Anaheim, CA

Any other questions? Just Ask!

Call at 360.455.1569
or email Jen@LindaKeithCPA.com

"With the help of this course, I am more comfortable when analyzing tax returns."
Willis Hwang, Credit Analyst
Premier Commercial Bank, California

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More training options...

Virtual Interactive Training

The benefits of in-person with the convenience of online. Virtual Training combines the online self-study, discussion group, live webinars and personalized feedback on submitted case studies. Convenience of online with the interaction and accountability of live.

www.TaxReturnAnalysis.com

Self-Study Online Training

Take courses when you need them.

- Short, concise, convenient and practical.
- Quizzes test your knowledge as you go.
- Document your progress
- Fast paced, interactive, colorful.... just like Linda!

www.LendersOnlineTraining.com

"Best way to keep on track on business tax returns without getting up from your office chair!"
Shirley Langford, Loan Officer
Whidbey Island Bank, Washington

Cashflow Worksheets

- Do the math right every time and include help pop up boxes.
- Provide excellent documentation and consistency among lenders.
- Excel based so you don't have to learn new software.
- Global analysis made easier.

Self-Study Manuals

Go online to order. Manuals are included with 'live' workshops. Each manual is self-sufficient, loaded with hands-on exercises and detailed explanations. They include camera-ready worksheets for your use.

"I cannot thank Linda enough for such a great resource! Clean, concise and ready to use."
Charles Schafer, VP
Bank of Lincoln County, Maine