

American Tax & Business Shoppe, LLC.

Effective Money Management

Check our Calendar

<http://calendar.ameritaxshoppe.com>

By Donald J. Christie, IRS Enrolled Agent, MBA

Presentation

1. The Great American Tragedy
2. Risk Profile
3. Your Individual Income Tax Return
 - a. Thing to watch
 - i. Helpful hints regarding the IRS
 - ii. Dealing with the IRS
 - iii. IRS Tips
 - iv. Avoid IRS Problems
 - v. Audits
 - b. The Pros and Cons of preparing your own tax return
 - i. Purchasing your own tax software
 - ii. What to look for in a tax preparer
 - iii. Top ten filing errors
4. Financial Planning
 - a. Scam avoidance
 - b. Questions to ask
 - c. Stocks
 - d. Mutual funds/IRAs/401Ks
 - e. CDs
 - f. Life Insurance
 - g. Home Owner's Insurance
5. Wills, Power of Attorney, Healthcare Surrogate, Living Will
6. Incorporating – Starting your own business



Serving the tax & business needs of the community!