

## ATAP AGENDA

### THURSDAY JANUARY 21, 2021

<b>12:00-1:00 PM ET</b> <a href="#">Evelyn Jacks</a> President Knowledge Bureau MFA™, DFA-Tax Services Specialist™, RWM™	<b>FAMILY FILING AND T1 FORMS REVIEW</b> <ul style="list-style-type: none"><li>• Changes to the T1 and Schedules</li><li>• Key Tax Theory Changes</li><li>• Note: Please print T1 Tax Forms Appendix 1</li></ul>
<b>1:00– 2:00 PM</b> Evelyn Jacks, MFA™, RWM™, DFA-Tax Services Specialist™	<b>PANDEMIC SUPPORTS REVIEW</b> <ul style="list-style-type: none"><li>• Changes for Employees</li><li>• Changes for Students</li><li>• Changes for Business Owners</li></ul>
<b>2:00 – 2:15 PM</b>	<b>BREAK</b>
<b>2:15 – 3:00 PM</b> Alan Rowell, RWM™, MFA™, DFA-Tax Services Specialist™	<b>TAX PROFILE REVIEW</b> <ul style="list-style-type: none"><li>• Seniors – What’s New in 2020?</li><li>• Property Owners – New Issues in 2020</li><li>• Investors – Managing Assets, After Tax</li></ul>
<b>3:00– 3:30 PM</b> Alan Rowell	<b>TAX FACTS REVIEW</b> <ul style="list-style-type: none"><li>• <b>Tax Season 2020 Jeopardy</b></li></ul>
<b>FRIDAY JANUARY 22, 2021</b>	
<b>12:00-2:30 PM ET</b> Dr. Dean Smith, PHD, CFP, TEP, CPA, CA, RWM™	<b>PROPRIETORSHIPS AND CORPORATE OWNER MANAGER UPDATE</b>
<b>2:30 – 2:45 PM</b>	<b>BREAK</b>
<b>2:45 – 3:30 PM</b> Alan Rowell	<b>CASE STUDY: DEATH OF A TAXPAYER AND T3 REVIEW</b>