

Please Mark Your Calendars for the Next Chapter Meeting

“Tax Stuff Planners Need to Know Now!”

Presented By: **Kent Noard, EA**

Wednesday, February 6, 2013

7:15am –9:15am

At the present time, the “Fiscal Cliff” looms over taxpayers making it difficult to plan for 2012 and 2013. Depending on the results of the negotiations, your clients’ tax liabilities may be severely impacted not only for those years but future years as well.

Although there may not be much that can be done about the 2012 tax year, planning for 2013 is going to be very important, especially relative to investment income. During this session, Kent will be discussing these changes and how they will affect your clients. He will also include tax planning issues that are not affected by Congressional action, or the lack thereof. Included will be the new Medicare tax for wages and investment income and the retroactive application of the state tax increase for higher income taxpayers.

Kent E. Noard is the principal of KLN Financial Group and has been in private practice since 1981 providing tax preparation and planning, and financial planning and consulting. He is a Certified Financial Planner practitioner and an Enrolled Agent. He was formerly an instructor and coordinator of the PFP Certificate program at the University of California at Santa Cruz Extension. At UC Extension, he taught the Income Tax Planning and Practicum courses, and has previously taught the Survey of Personal Financial Planning, Mathematics of Financial Planning and Employment Benefits and Retirement Planning classes.

Prior to entering private practice, Kent was employed with the Internal Revenue Service. During his career with the IRS, he was a collection representative, an office auditor, a revenue agent, and the Assistant Tax Shelter Coordinator for the San Francisco District.

Kent earned his Masters degree in Taxation from Golden Gate University and his Bachelors degree in Accounting from San Jose State University..

Thank You For Joining Us Today—See You Next Month!