




THE TAX BOOK

2024
PRODUCT
CATALOG




Award-winning tax research solutions for time-crunched tax professionals.



THE TAX BOOK

Fast-Answer Tax Research Books


Page 2



WEB LIBRARY

Fast-Answer Online Tax Research


Page 6



CLIENT HANDOUTS

Unlimited-Use Promotional Handouts

Page 8



ONLINE CPE

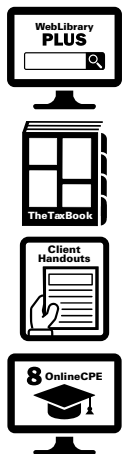
Self-Study Online Tax Courses

Page 10

2024 SPECIAL OFFERS

BUNDLE & SAVE!

Three options that include our award-winning online tax research.



INCLUDES

WebLibrary Plus 1st User
Deluxe Edition Plus
Client Handouts
8 Online CPE Hours
Free Shipping
Total Retail Value
Add Users

1 TTB BUNDLE

\$519 \$298 Off Retail!

✓	\$349
✓	\$119
✓	\$199
✓	\$139
✓	\$11
Total	\$817

\$189 Per Add User \$238 Off Retail!

2 JACOB SPECIAL

\$399 \$219 Off Retail!

✓	\$349
✓	\$119
✓	\$139
✓	\$11
Total	\$618

\$179 Per Add User \$169 Off Retail!

3 DIGITAL COMBO

\$399 \$288 Off Retail!

✓	\$349
✓	\$199
✓	\$139
Total	\$687

\$179 Per Add User \$118 Off Retail!

DELUXE DEAL

Our two most popular books!



\$169 \$61 Off Retail!

INCLUDES

Deluxe Edition Plus	\$119
Deluxe Supplement	\$89
Free Shipping	\$22
Total Retail Value	\$230

WHAT'S NEW PACKAGE

Stay updated on new tax law!



\$129 \$71 Off Retail!

INCLUDES

Early Edition	\$89
Tax Season Edition	\$89
Free Shipping	\$22
Total Retail Value	\$200



VOTED #1 TAX RESEARCH SOLUTION 11 YEARS IN A ROW!

TheTaxBook has been voted the #1 Tax Research Solution in the CPA Practice Advisor's Readers' Choice Awards from 2013-2023.



TTB THE TAX BOOK

FAST-ANSWER TAX RESEARCH BOOKS

Save time, guaranteed. We compile the mountains of tax information, condense it for quick comprehension, and present it in a fast-answer format. thetaxbook.com/books

DELUXE EDITION PLUS

BEST Seller



The Deluxe Edition Plus is by far our best seller! The book contains both individual and small business information. You will find information fast, with well-written and easy-to-understand explanations and examples.

thetaxbook.com/deluxe

530+ PAGES

\$119

START SHIP DATE 12/15/24

INDIVIDUAL FORMS:

1040, 2441, 4562, 4684, 4797, 6251, 8283, 8582, 8606, 8829, 8863, 8949

BUSINESS FORMS:

1120, 1120-S, 1065, 1041, 990, 706, 709, 941, 940

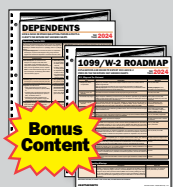
SCHEDULES:

1, 2, 3, A, B, C, D, E, EIC, F, H, SE

INDIVIDUAL TABS 1-17 BUSINESS TABS 18-26

- 1 What's New
 - 2 Federal Tax Table & EIC Table
 - 3 1040 Line Instructions
- FASTTAXFACTS: DEPENDENTS**
- 4 Itemized Deductions, A
 - 5 Sole Proprietorships and Farmers, C, F, SE
 - 6 Investment Income, B, D, 4797
 - 7 Rental, Passive, and At-Risk, E
 - 8 Business Deductions
 - 9 Depreciation, 4562
 - 10 Automobiles and Listed Property
 - 11 Tax Credits
 - 12 Children, College, and Family
 - 13 Retirement, Social Security, and Medicare
 - 14 Other 1040 Topics
 - 15 IRS, Penalties, and Audits
 - 16 Where to File and Tools
- FASTTAXFACTS: 1099/W-2 ROADMAP**
- 17 States
 - 18 C Corporations, 1120
 - 19 S Corporations, 1120-S
 - 20 Partnerships and LLCs, 1065
 - 21 Estates, Trusts, & Fiduciaries, 1041, 706, 709
 - 22 Employee Benefits
 - 23 Payroll and Labor Laws, 940, 941
 - 24 Business Tools and Worksheets
 - 25 Other Business Topics
 - 26 What's New Business

THE DELUXE EDITION PLUS INCLUDES TWO FASTTAXFACTS!



1. **DEPENDENTS**
Bound in after Tab 3
2. **1099 / W-2 ROADMAP**
Bound in after Tab 16

See page 4 for additional information on FastTaxFacts.

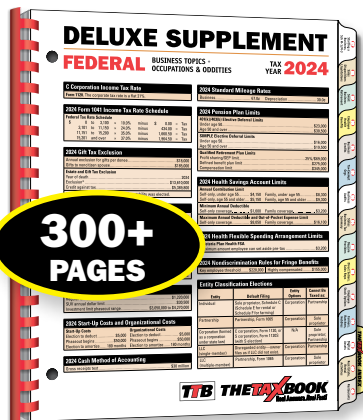
DELUXE DEAL

Deluxe Edition Plus	\$119
Deluxe Supplement	\$89
Free Shipping	\$22
TOTAL RETAIL VALUE	\$230

\$169

\$61 Off Retail!

DELUXE SUPPLEMENT



The perfect complement to the Deluxe Edition Plus. Find expanded coverage of small business topics plus information on popular occupations and oddities. thetaxbook.com/deluxesupplement

300+ PAGES

\$89

START SHIP DATE 12/15/24

BUSINESS FORMS:

996, 990, 1023, 1024, 1028, 1099-DIV, 1099-SA, 3800, 5330, 8594, 8889, 8925

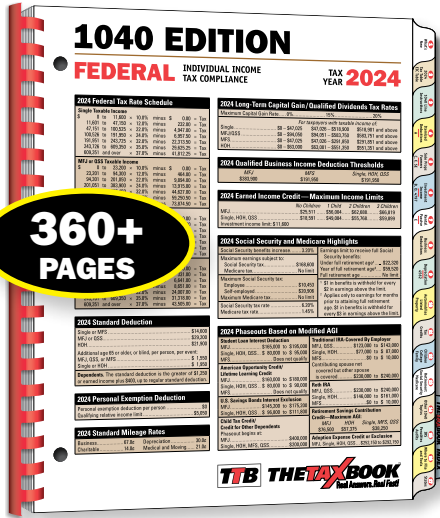
SCHEDULES:

M-1, M-2, M-3

BUSINESS TABS 27-41

- 27 Starting a Business, Sch M-1/M-3
- 28 Sales, Dispositions, Liquidations
- 29 Small Business Retirement
- 30 Employee Health Benefits
- 31 Business Credits
- 32 Tax-Exempt Organizations
- 33 Business Audit Strategies
- 34 States Business Tax Summary
- 35 Daycare Providers
- 36 Direct Sellers & Sales Representatives
- 37 Employee Stock Options
- 38 Farmers, Ranchers, and Hobbies
- 39 Digital Assets
- 40 Real Estate and Rental Activities
- 41 Restaurants

1040 EDITION



If you prepare individual returns, and the associated schedules, the 1040 Edition is the book for you. This book contains the same individual information as the Deluxe Edition Plus (Tabs 1-17). thetaxbook.com/1040

\$89

START SHIP DATE 12/15/24

INDIVIDUAL FORMS:
1040, 2441, 4562, 4684, 4797, 6251, 8283, 8582, 8606, 8829, 8863, 8949

SCHEDULES:
1, 2, 3, A, B, C, D, E, EIC, F, H, SE

INDIVIDUAL TABS 1-17

- 1 What's New
- 2 Federal Tax Table & EIC Table
- 3 1040 Line Instructions
- 4 Itemized Deductions, A
- 5 Sole Proprietorships and Farmers, C, F, SE
- 6 Investment Income, B, D, 4797
- 7 Rental, Passive, and At-Risk, E
- 8 Business Deductions
- 9 Depreciation, 4562
- 10 Automobiles and Listed Property
- 11 Tax Credits
- 12 Children, College, and Family
- 13 Retirement, Social Security, and Medicare
- 14 Other 1040 Topics
- 15 IRS, Penalties, and Audits
- 16 Where to File and Tools
- 17 States

SMALL BUSINESS



The perfect companion to the 1040 Edition. This book contains the same business information as the Deluxe Edition Plus (Tabs 18-26) as well as eight additional tabs found in the Deluxe Supplement (Tabs 27-34).

thetaxbook.com/smallbusiness

\$89

START SHIP DATE 12/15/24

BUSINESS FORMS:
1120, 1120-S, 1065, 1041, 990, 706, 709, 941, 940, 1120-H, 966, 2553, 3800, 1099-MISC, 1310, 56

SCHEDULES:
K-1, M-1, M-2, B-2, PH

BUSINESS TABS 18-34

- 18 C Corporations, 1120
- 19 S Corporations, 1120-S
- 20 Partnerships and LLCs, 1065
- 21 Estates, Trusts, & Fiduciaries, 1041, 706, 709
- 22 Employee Benefits
- 23 Payroll and Labor Laws, 940, 941
- 24 Business Tools and Worksheets
- 25 Other Business Topics
- 26 What's New Business
- 27 Starting a Business, Sch M-1/M-3
- 28 Sales, Dispositions, Liquidations
- 29 Small Business Retirement
- 30 Employee Health Benefits
- 31 Business Credits
- 32 Tax-Exempt Organizations
- 33 Business Audit Strategies
- 34 States Business Tax Summary

FEDERAL EDITION COMPARISON

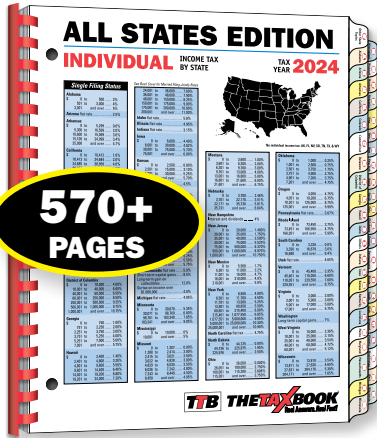
Which books are right for you? Compare editions at: thetaxbook.com/compare

	TABS 1-17	TABS 18-26	TABS 27-34	TABS 35-41	2 BOUND FASTTAXFACTS
Deluxe Edition Plus BEST Seller	✓	✓			✓
Deluxe Supplement			✓	✓	
1040 Edition	✓				
Small Business		✓	✓		

OUR CUSTOMERS TELL US...

- They find answers to 90-95% of their tax questions in TheTaxBook.
- On average, they save 10-15 minutes per question by referencing TheTaxBook.
- They reference TheTaxBook 2-3 times a day during tax season!
- 86% of our customers keep TheTaxBook within arm's reach during tax season.

ALL STATES EDITION



Fast answers to each state's unique income tax rules. A must have book when preparing out-of-state returns.

thetaxbook.com/allstates

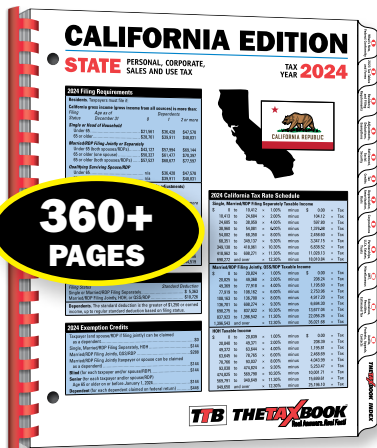
\$119

START SHIP DATE 2/1/25

TOPICS BY STATE

- Tax Rates & Tables
- Filing Requirements
- Resident, Part-Year Resident, and Nonresident Filing Information
- Additions & Subtractions
- Adjustments, Exemptions & Credits
- Pension Exclusions
- Underpayment Penalties
- Filing Addresses & Deadlines
- School District Codes
- Contact Information
- Estimated Tax & Reciprocal Agreements
- Property Tax Credits/Refunds

CALIFORNIA EDITION



California is filled with complicated tax code. The California Edition answers your questions about state tax law for individuals, corporations, partnerships, LLCs, estates, and trusts.

thetaxbook.com/california

\$89

START SHIP DATE 2/1/25

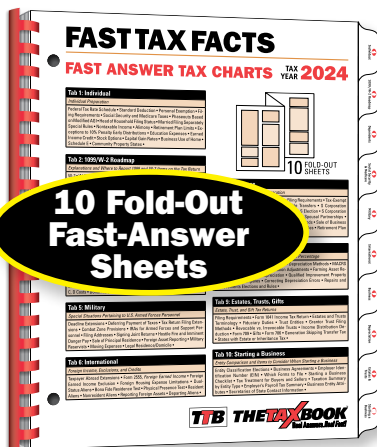
FORMS:
540, 540NR, 100,
100S, 541, 565, 568

SCHEDULES:
CA (540/540NR), D,
K-1, P, R, S, X

TAB TOPICS

- 1 What's New and Federal Conformity
- 2 California Tax Tables
- 3 Residency and Filing Requirements
- 4 Adjustments, Deductions, and Exemption Credits
- 5 Retirement and Social Security
- 6 Individual and Business Tax Credits
- 7 Depreciation, Amortization and Basis
- 8 Corporations
- 9 Partnerships, LLCs, Estates and Trusts
- 10 AMT and Miscellaneous
- 11 Extensions, Penalties, and Estimated Tax
- 12 Audits, Protests, Appeals and Contacts

FASTTAXFACTS



10 laminated fast-answer fold-out sheets, bound into one book. Each sheet contains popular charts found throughout all editions of The TaxBook Series. Most sheets contain some information not found in other publications. Keep commonly referenced information, tax facts, and charts at your fingertips.

thetaxbook.com/fasttaxfacts

\$89

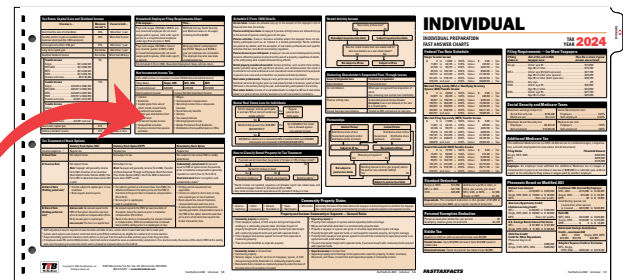
START SHIP DATE 12/15/24

TAB TOPICS

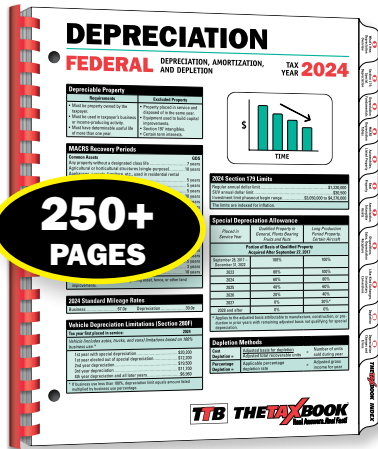
- 1 Individual
- 2 1099/W-2 Roadmap
- 3 Dependents
- 4 Social Security & Medicare
- 5 Military
- 6 International
- 7 Business
- 8 Depreciation
- 9 Estates, Trusts, Gifts
- 10 Starting a Business

60 PAGES OF FAST ANSWER TAX CHARTS!

Each tri-fold sheet contains six pages. Sheets expand in size to 24½" x 11"



DEPRECIATION



Comprehensive coverage of depreciation, amortization, and depletion pertaining to business property and other tangible assets.

thetaxbook.com/depreciation

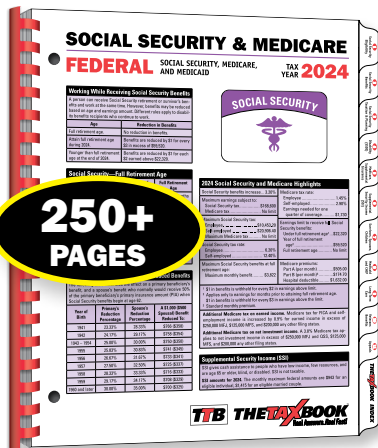
\$89

START SHIP DATE 12/15/24

TAB TOPICS

- 1 What's New and Depreciation Basics
- 2 Section 179 and Special Depreciation
- 3 MACRS Depreciation
- 4 MACRS Depreciation Tables
- 5 Listed Property and Automobiles
- 6 Real Property
- 7 Amortization and Intangible Assets
- 8 Dispositions, Sales, and Depreciation Recapture
- 9 Like-Kind Exchanges & Involuntary Conversions
- 10 Depletion
- 11 Depreciation Changes and Errors

SOCIAL SECURITY & MEDICARE



Detailed coverage of Social Security, Medicare, Medicaid, and other programs. Fast answers to frequently asked retirement, disability, and Medicare questions.

thetaxbook.com/socialsecuritymedicare

\$89

START SHIP DATE 2/1/25

TAB TOPICS

- 1 Social Security Eligibility
- 2 Social Security Benefits
- 3 Social Security Taxation and Planning
- 4 Disability (SSDI)
- 5 Medicare & Supplemental Insurance
- 6 Supplemental Security Income (SSI)
- 7 Survivors, Spouses, and Children
- 8 Medicaid and CHIP
- 9 Long-Term Care
- 10 Veterans Benefits
- 11 Appeals

WHAT'S NEW PACKAGE



Stay up-to-date on the latest tax law changes and industry news. Includes regulations, revenue rulings, notices, announcements, court cases, and more.

thetaxbook.com/whatsnew

EARLY EDITION

\$89

Coverage Through 7/1/24

START SHIP DATE 8/1/24

TAX SEASON EDITION

\$89

Coverage Through 1/1/25

START SHIP DATE 2/1/25

TAB TOPICS

- 1 What's New Summary
 - 2 Individuals
 - 3 Small Businesses
 - 4 Miscellaneous Provisions
- Additional Tabs TBD Based on Tax Developments



WHAT'S NEW PACKAGE

INCLUDES:

Early Edition	\$89
Tax Season Edition	\$89
Free Shipping	\$22
TOTAL RETAIL VALUE	\$200

\$129 \$71 Off Retail!



TTB WEBLIBRARY

FAST-ANSWER ONLINE TAX RESEARCH

Award-winning online tax research! Having the most up-to-date tax information at your fingertips is critical. Find information fast, with well-written and easy-to-understand explanations and examples. Save time and money. thetaxbook.com/weblibrary

**WEBLIBRARY
1ST USER
\$209**

\$118 Off Retail Value

WebLibrary Add User:
\$119 PER USER*

**WEBLIBRARY PLUS
1ST USER
\$349**

\$601 Off Retail Value

WebLibrary Plus Add User:
\$159 PER USER*

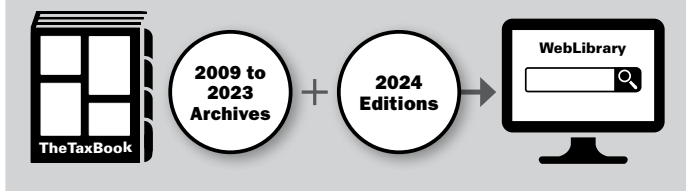
**BEST
Seller**

**\$950
Retail
Value!**

THETAXBOOK SERIES	WEBLIBRARY	WEBLIBRARY PLUS	RETAIL VALUE
Deluxe Edition Plus	✓	✓	\$119
Deluxe Supplement	✓	✓	\$89
All States Edition	✓	✓	\$119
California Edition		✓	\$89
Depreciation		✓	\$89
Social Security & Medicare		✓	\$89
What's New Early Edition		✓	\$89
What's New Tax Season Edition		✓	\$89
Occupation & Oddities ONLINE ONLY		✓	\$89
FastTaxFacts		✓	\$89
Tax Industry News	✓	✓	\$89
Tools for Tax Pros	✓	✓	\$89
TheTaxBook Archives	✓	✓	\$89
			\$950
GOVERNMENT DOCUMENTS	WEBLIBRARY	WEBLIBRARY PLUS	
Publications	✓	✓	
Forms & Instructions	✓	✓	
Internal Revenue Code		✓	
Treasury Regulations		✓	
Circular 230		✓	
Court Cases		✓	
Letter Rulings		✓	
Revenue Procedures		✓	
Revenue Rulings		✓	
Notices		✓	
Announcements		✓	
Bulletins (IRB)		✓	
Manual (IRM)		✓	

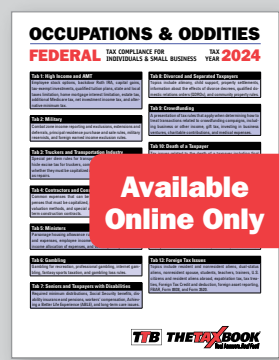
WEBLIBRARY FEATURES

- **TheTaxBook Online:** Same content as the printed books.
- **Easy to Search:** Find answers fast!
- **Up-To-Date Content:** Updated to reflect new legislation and the latest information released from the IRS.
- **PDF Format:** Print and/or email pages to your clients.
- **Access Anywhere:** Available anywhere you have internet.
- **Use Any Device:** Computer, iPad, smartphone, or tablet.
- **Bookmarks & History:** Bookmark information for future reference. Find previously viewed documents fast.
- **TheTaxBook Archives:** Access previous years' editions.



FREE ONLINE CPE HOURS WITH EACH USER PURCHASED! SEE PAGE 10

OCCUPATIONS & ODDITIES



WEBLIBRARY PLUS EXCLUSIVE!

High Income & AMT, Military, Truckers and Transportation Industry, Contractors & Construction, Ministers, Gambling, Seniors & Taxpayers With Disabilities, Divorced and Separated Taxpayers, Crowdfunding, Death of a Taxpayer, Public Safety Personnel, Household Employees, Foreign Tax Issues

SUBSCRIPTION TERM: Subscription valid through 12/1/25.
***ADD USERS:** Add up to 4 users to your subscription.

TTB WEBLIBRARY Switch Product **1** Welcome, TTB Customer
[Help](#) | [Account](#) | [Logout](#)

Category: All Search ... **2**

3 Index # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

4 Deluxe Edition Plus Front Cover / (Inside Cover) | Deluxe Supplement Front Cover / (Inside Cover)

Deluxe Edition Plus Front Cover / (Inside Cover)	Deluxe Supplement Front Cover / (Inside Cover)
Tab 1 What's New	Tab 22 Employee Benefits
Tab 2 Federal Tax Table and EIC Table 4	Tab 23 Payroll and Labor Laws, 940, 941
Tab 3 1040 Line Instructions	Tab 24 Business Tools and Worksheets
Tab 4 Itemized Deductions, A	Tab 25 Other Business Topics
Tab 5 Sole Proprietorships and Farmers, C, F, SE	Tab 26 What's New Business
Tab 6 Investment Income, B, D, 497	Tab 27 Starting a Business, Sch M-1/M-3
Tab 7 Rental, Passive, and At-Risk, E	Tab 28 Sales, Dispositions, Liquidations
Tab 8 Business Deductions	Tab 29 Small Business Retirement
Tab 9 Depreciation, 4562	Tab 30 Employee Health Benefits
Tab 10 Automobiles and Listed Property	Tab 31 Business Credits
Tab 11 Tax Credits	Tab 32 Tax-Exempt Orgs
Tab 12 Children, College, and Family	Tab 33 Business Audit Strategies
Tab 13 Retirement and Employee Benefits	Tab 34 States Business Tax Summary
Tab 14 Other 1040 Topics	Tab 35 Daycare Providers
Tab 15 IRS, Penalties, and Audits	Tab 36 Direct Sellers
Tab 16 Worksheets and Where to File	Tab 37 Employee Stock Options
Tab 17 States	Tab 38 Farmers, Ranchers, and Hobbies
Tab 18 C Corporations, 1120	Tab 39 Digital Assets
Tab 19 S Corporations, 1120S	Tab 40 Real Estate and Rental Activities
Tab 20 Partnerships and LLCs, 1065	Tab 41 Restaurants
Tab 21 Estates, Trusts, and Fiduciaries, 1041, 706, 709	Tab 42 FastTaxFacts Inserts
Deluxe Edition Plus Back Cover / (Inside Cover)	Deluxe Supplement Back Cover / (Inside Cover)

5 TheTaxBook Series
 Deluxe & Supplement
 All States
 California Edition
 Depreciation
 SS & Medicare
 What's New Edition
 Occupations & Oddities
 FastTaxFacts
 Tax Industry News
 Tools for Tax Pros
 TheTaxBook Archives
 Page Updates
6 Government Documents
 Publications
 Forms & Instructions
 Internal Revenue Code
 Treasury Regulations
 Circular 230
 Court Cases
 Letter Rulings
 Revenue Procedures
 Revenue Rulings
 Notices
 Announcements
 Bulletins (IRB)
 Manual (IRM)
7 History and Bookmarks
 History
 Bookmarks
 Account

8 History and Bookmarks

TheTaxBook Archives (2009-2023) | Tax Charts and Weblibrary Guide | Page Updates

Copyright © 2024 Tax Materials, Inc. | 866-919-5277 | info@thetaxbook.com | [Privacy Statement](#) | [Terms](#)

TheTaxBook & More Online!

NAVIGATING THE WEBLIBRARY

- 1 Switch Product:** Easily switch between the WebLibrary, Client Handouts, and Online CPE.
- 2 Library Search:** Receive instant results for keyword searches. Search all libraries or search the library of your choice. As you type in the search box, search suggestions appear.
- 3 TheTaxBook Index:** Click on a letter to display a drop down box containing index references for TheTaxBook.
- 4 Go right to a tab.** Click and go!
- 5 Select TheTaxBook:** Quickly switch between books.
- 6 TheTaxBook Archives:** Access previous years editions of TheTaxBook.
- 7 Government Documents:** Up-to-date library of information released by the IRS. Easy to search. Bookmark commonly used documents.
- 8 History and Bookmarks:** Find previously viewed documents fast! Create and name bookmarks, to find documents quickly for future reference.

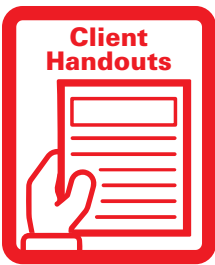
WHAT OUR CUSTOMERS ARE SAYING ABOUT THE WEBLIBRARY

"The WebLibrary is my "go to" resources during tax season. The search function is especially quick when a client is sitting at my desk."

Lee Richardson, Orange Park, FL

"The WebLibrary is very user friendly and easy to navigate."

- Dan Dannis, Costa Mesa, CA



CLIENT HANDOUTS

UNLIMITED-USE PROMOTIONAL HANDOUTS

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! thetaxbook.com/handouts

\$199

Client Handouts Add User:
\$79 PER USER*

ADD A USER

- Additional users will have their own Username and Password to access the Client Handouts.
- Great for tax firms with several preparers and/or multiple locations.

HOW IT WORKS

- Access over 100 handouts.
- Login to your online subscription immediately.
- Customize handouts with your logo (optional) and address.
- Print handouts for distribution (unlimited printing).
- Create PDFs to email your clients.
- Includes a printed reference guide that ships in December.

HANDOUTS OVERVIEW

- **Tax Brochures:** Explain tax concepts to your clients.
- **Planning Tips:** Help your clients minimize tax liability.
- **Organizers:** Get your clients ready for tax season. Includes individual and business versions.
- **Updates:** Handouts are updated throughout the year to reflect new tax law.

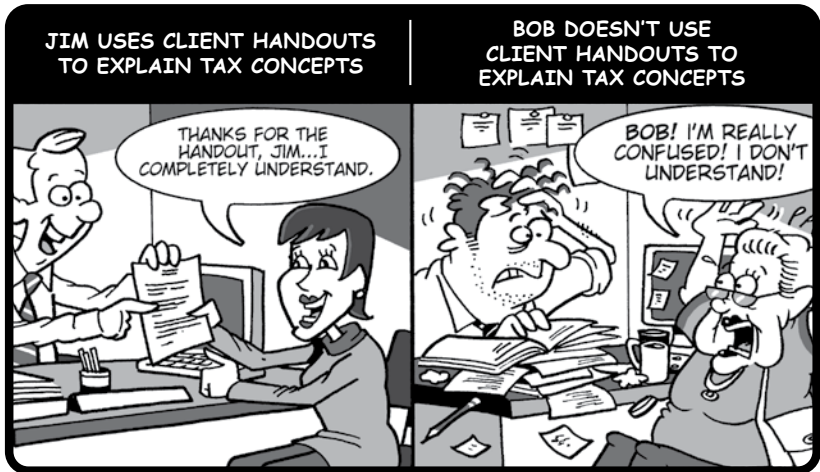
SUGGESTED USES

- Place handouts in each client's folder before tax season.
- Send handouts to new clients for a great first impression.
- During tax season, email/mail handouts to clients who have not yet scheduled their appointment.
- Place handouts on your website or distribute via social media.
- Keep your name in front of clients all year by sending quarterly newsletters.
- Provide customized handouts in your reception area.

100+ Customizable Handouts!



Landscape and Portrait versions available.



SUBSCRIPTION TERM: Subscription valid through 12/1/25.
***ADD USERS:** Add up to 4 users to your Client Handouts subscription.

7 CATEGORIES OF HANDOUTS TO CHOOSE FROM!



1040



BUSINESS



ESTATES & TRUSTS



PLANNING



RETIREMENT



ORGANIZERS



NEWSLETTERS

1040

Alternative Minimum Tax
Audits
Cancellation of Debt - Insolvency
Capital Gains and Losses
Charitable Contributions Guide
Charitable Contributions Noncash FMV Guide
Charitable Contributions Recordkeeping Requirements
Clergy - Religious Workers
Consumer Credit
Cost Sharing Reduction and the Premium Tax Credit
Crowdfunding
Dependent Support Worksheet
Digital Assets
Divorce and Taxes
Education Tax Benefits
Energy and Vehicle Credits
Estimated Taxes
Extending Your Individual Income Tax Return
Families With Children*
Filing Status
Foreign Bank and Financial Accounts
Gambling Log
Health Insurance Marketplace
Health Savings Accounts (HSAs)
High-Income Taxpayers
Hobby vs. Business
Household Employees
Identity Theft and Your Taxes
Itemized Deductions - Casualty and Theft Losses
Itemized Deductions - Homeowners
Itemized Deductions - Interest Paid
Itemized Deductions - Medical Expenses*

*Spanish Handout Available

1040 Cont.

Itemized Deductions - Taxes Paid
Kiddie Tax
Like-Kind Exchanges
Moving Expenses
Multi-State Taxation
Sale of a Principal Residence
Standard vs. Itemized Deduction
Stock Options - Same Day Sales
Tax Facts and Figures
Tax Scams - Protect Yourself
Taxable Social Security Benefits
Taxpayers Who Receive an IRS Notice
Tipped Employees
What To Do if You Can't Pay Your Taxes
Withholding - Filling Out Form W-4

BUSINESS

Business Entity Comparison Chart
Business Entity Pros and Cons
Business Expenses Worksheet
Business Management Tips
Business Owners - Taking Money Out of a Business
Business Use of Home
Buy-Sell Agreements
Corporation Meeting Requirements
Daycare Providers Income and Expenses
Employee or Independent Contractor*
Employer Insurance Requirement
Excess Business Loss and Net Operating Loss (NOL)
Expense Reimbursements for Employees
Farm Expenses Worksheet
Farm Income Worksheet

BUSINESS Cont.

Farm Inventory and Accounting Methods
Farm Vehicles and Fuels
FinCEN Beneficial Ownership Reporting
Form 1099-K
Form 1099-MISC and Form 1099-NEC Reporting Fringe Benefits
Inventory Cost of Goods Sold
Limited Liability Companies (LLCs)
Mileage and Expense Log
Partnerships
Qualified Business Income Deductions
Real Estate Professionals
Recordkeeping for Tax Purposes
Rental Income and Expense Worksheet
Rental Income and Expenses
Rental Real Estate QBI Safe Harbor
Reparis vs. Improvements
Rideshare Drivers
S Corporations
Self-Employment Tax
Short-Term Rentals
Small Business Health Care Tax Credit
Starting a Business
Vehicles - Business Use

ESTATES & TRUSTS

Death of a Taxpayer
Estate Tax (Form 706)
Gift Tax
Personal Representatives - Estates

NEWSLETTERS

Released mid-January, mid-April, mid-June, mid-September, and mid-December.

PLANNING

Early Retirement Distributions - SEPP
Estate Planning, Wills, Probate, and Transfer of Assets
Moving Out Worksheet
Newlyweds Tax Tips
Pension Income Planning
Saving for College

RETIREMENT

IRA - Backdoor Roth IRA
IRA- Beneficiaries of IRAs and Qualified Plans
IRA- Kinds of IRAs and Prohibited Transactions
IRA - Qualified Charitable Distribution (QCD)
IRA - Required Minimum Distribution (RMDs)
IRA - Roth IRAs
IRA - Traditional IRAs
Retirement Income
Reverse Mortgage
Saving for Retirement
Social Security and Medicare

ORGANIZERS

C Corporation Tax Organizer
General Engagement Letter for Individual Tax Preparation
Individual Taxpayer Organizer*
Individual Taxpayer Organizer - Rental Property
Individual Taxpayer Organizer - Sole Proprietorship
LLC Tax Organizer
Paid Preparer Due Diligence Checklist
Partnership Tax Organizer
S Corporation Tax Organizer



SELF-STUDY ONLINE TAX COURSES

We offer 20 online continuing professional education (CPE) courses presented in self-study format. We have a 99% customer satisfaction rating for CPE courses. thetaxbook.com/onlinecpe

PURCHASE HOURS TO COMPLETE ANY COURSE!

20 HOURS

\$219

\$10.95/HOUR

8 HOURS

\$139

\$17.38/HOUR

2 HOURS

\$59

\$29.50/HOUR

ONLINE CPE HOURS DO NOT EXPIRE.

Subject to CPE policy found at thetaxbook.com/cpepolicy.

HOW IT WORKS

- Purchase hours to complete any course.
- Receive instant access to hours.
- Read courses online or print provided PDF.
- Share hours with your staff.
- Track completed courses.
- Print certificates of completions.
- Course results are uploaded to IRS and CTEC.

AFSP PROGRAM

The Annual Filing Season Program is a voluntary program, offered by the IRS, designed to encourage tax return preparers to participate in continuing education (CPE) courses.

Use the AFSP tracker in our Education Center to track your AFSP hours.

The IRS has determined two classifications of tax preparers:

EXEMPT: Requires 15 CPE Hours

NON EXEMPT: Requires 18 CPE Hours

Learn more at: thetaxbook.com/afsp

FREE CPE WITH PURCHASE

Product	Free Online CPE Hours	Retail Value
TheTaxBook Series	1 hour per book	\$29.50
WebLibrary Plus 1st User	5 hours per 1st user	\$147.50
WebLibrary 1st User	2 hours per 1st user	\$59.00
Additional Users	1 hour per additional user	\$29.50

Plus! TTB Bundle, Jacob Special, and Digital Combo include 8 hours each.

COURSES ARE VALID FOR CPAs, EAs, AND TAX PROFESSIONALS

Tax Materials, Inc. is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.NASBARegistry.org

Tax Materials, Inc. has been approved by the State Board of Tax Practitioners of Oregon to provide continuing education for tax practitioners in Oregon.

NYS Sponsor ID Number is 002569



ONLINE CPE COURSES

20 COURSES
TO CHOOSE FROM

HIGHLY RECOMMENDED COURSES

As an expert in your field, you know the importance of staying up-to-date on the tax industry. The following courses are highly recommended because they cover subjects with significant changes within the past year.

FEDERAL TAX UPDATE

Course Length: 3 Hours Release date: 7/15

This course includes recent federal tax law changes and updates, inflation adjustments for tax year 2024, and more.

HOT TOPICS

Course Length: 3 Hours Release date: 9/15

Stay up to date on the following topics: Energy Credits, Guide to IRS Collections & Married Taxpayer Topics

NEW! DIVORCED TAXPAYERS

Course Length: 1 Hour Release date: 9/15

Enhances competence in preparing income tax returns for taxpayers in divorce situations. Subject matter includes the rules for determination of deductible and taxable alimony, dependency, treatment of retirement benefit settlements, and steps to take when a conflict of interest exists.

COMPLIANCE & ETHICS COURSES

Credentialed tax professionals have CPE requirements dictated by the IRS and/or their state. Each year we offer three Ethics courses, the AFTR course, and a California Tax Review course to fulfill specific CPE requirements.

ANNUAL FEDERAL TAX REFRESHER (AFTR)

Course Length: 6 Hours Release date: 6/15

Non-exempt tax professionals who participate in the Annual Filing Season Program (AFSP) are required to complete the Annual Federal Tax Refresher (AFTR) course. Learn more at www.thetaxbook.com/AFTR.

CALIFORNIA TAX REVIEW

Course Length: 5 Hours Release date: 2/1

This course satisfies the CTEC 5 hour California state tax requirement for CRTPs. Content includes rules for individuals, partnerships, LLCs, corporations, estates and trusts, and more.

Several professional credentials require two hours of Ethics each year. We offer three educational and entertaining courses to fulfil your Ethics requirement.

CIRCULAR 230 ETHICS

Course Length: 2 Hours Release date: 9/15

AVOID ETHICAL VIOLATIONS

Course Length: 2 Hours Release date: 9/15

DISCLOSING CLIENT INFORMATION

Course Length: 2 Hours Release date: 9/15

TRAINING COURSES

Do you have a new preparer in the office? Want to brush up on the basics? Use these courses to get up to speed before tax season.

INDIVIDUAL TAX PREP 101

Course Length: 5 Hours Release date: 9/15

Review the basics for individual returns. Includes filing status, dependents, income, itemized deductions, tax credits, and more.

INDIVIDUAL TAX PREP 201

Course Length: 4 Hours Release date: 9/15

Review advanced topics for individual returns. Includes estimated tax payments, sole proprietorships, self-employment income, investment income, and more.

LIMITED TIME COURSES

Every year we release ten courses covering various professions, specific topics, and unique tax situation. Based on popularity and requests, some courses will rotate yearly. The following courses will be available one year from release date. Take them now before they are gone! All courses released 9/15/24 and available through 9/15/25.

CLIENTS WITH DEPENDENTS

Course Length: 4 Hours Release date: 9/15

DEATH OF A TAXPAYER

Course Length: 1 Hour Release date: 9/15

DIGITAL ASSETS

Course Length: 1 Hour Release date: 9/15

NEW! ESTATES

Course Length: 2 Hours Release date: 9/15

NEW! INTRODUCTION TO BUSINESS ENTITIES

Course Length: 3 Hours Release date: 9/15

LIMITED LIABILITY COMPANIES (LLCS)

Course Length: 1 Hour Release date: 9/15

NEW! PREPARING S CORPORATION RETURNS

Course Length: 4 Hours Release date: 11/15

SELF-EMPLOYED

Course Length: 4 Hours Release date: 9/15

NEW! SENIOR TAXPAYERS

Course Length: 2 Hours Release date: 9/15

STOCK OPTIONS

Course Length: 1 Hour Release date: 9/15

Complete learning objectives, course overviews, and other course information is available at thetaxbook.com/onlinecpe

WHY USE **THE**TAX**BOOK**

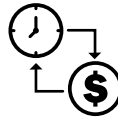
Use the Best



**VOTED #1
11 YEARS IN A ROW!**

TheTaxBook has been voted the #1 Tax Research Solution in the CPA Practice Advisor's Readers' Choice Awards from 2013-2023.

Time is Money



Fast and reliable information at your fingertips.

No Risk



100% satisfaction is guaranteed.

Accuracy



Don't put your reputation on the line based on search results from random Internet sites.

5-Star Google Rating
Over 500 Reviews!



5 FREE SERVICES WITH PURCHASE



Gain access to a stockpile of useful tools including organizers, engagement letters, and more.
thetaxbook.com/freeservices

1 TAX INDUSTRY NEWS
Find coverage of new legislation and industry news.



2 TOOLS FOR TAX PROS
Electronic printable documents to provide disclosures, record keeping, substantiation, and more.

3 THETAXBOOK UPDATES
Find pages in TheTaxBook affected by new tax law. Updates provided in PDF format for easy printing.

4 FREE ONLINE CPE HOURS
Receive free Online CPE Hours with almost every purchase. See page 10 for details.

Page 10

5 MESSAGE BOARD
Ask questions to fellow tax preparers. The Message Board is exclusive to our customers and not available to the general public.



QUANTITY DISCOUNTS

Buy 3 or More and SAVE!

THE MORE YOU BUY, THE MORE YOU SAVE!

	Order 3 items, take \$5 OFF per item.	Order 11+ items, take \$7 OFF per item.
1-2 Items	3-10 Items	11+ Items
N/A	\$5 Off Per Item	\$7 Off Per Item

WRITTEN EXCLUSIVELY BY PRACTICING TAX PREPARERS!

Our authors know what you need in a fast-answer tax research solutions because, like you, they prepare tax returns.

100+
YEARS

OVER 100 COMBINED YEARS OF FAST-ANSWER WRITING EXPERIENCE!

SATISFACTION GUARANTEED

Use our products for 30 days. If they did not meet your expectations, return them for a full refund.

CUSTOMER SATISFACTION RATING
98%

Highest published customer satisfaction rating in the industry.

A TRADITION OF QUALITY & VALUE!

Founded in 2005, TheTaxBook is a small, 100% American-owned company, located in Minnetonka, Minnesota. As a small company, we realize that each dollar you spend was hard earned and must bring true value. It is our passion to provide the best products at the best prices. Please use our products for the upcoming tax season!

Sincerely, the Meyer Family

FAMILY OWNED, AMERICAN MADE!

NEW! AUTO RENEWAL OPTION

THETAXBOOK NOW OFFERS THE ABILITY TO AUTO RENEW YOUR ORDER!

Auto Renewal allows you to skip the process of ordering every year! Sign up for Auto Renewal to lock in Early Bird Pricing and Free Shipping on your future orders.

AUTO RENEWAL DETAILS



- Your first Auto Renewal order will be charged on July 1 the year following your Auto Renewal registration.
- You have the ability to modify your Auto Renewal order, or opt-out of Auto Renewal, anytime prior to June 30 each year.
- You will receive Early Bird Pricing and Free Shipping on your future Auto Renewal orders.
- TheTaxBook standard Refund Policy applies to your Auto Renewal orders.

More details at
thetaxbook.com/autorenewal