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TAX RESEARCH  
SOLUTIONS FOR  
TIME-CRUNCHED TAX  
PROFESSIONALS.**



**TAXBERT**

AI Tax Research  
Assistant

Page 4



Fast-Answer Online  
Tax Research

Page 5



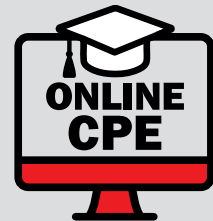
Fast-Answer  
Tax Research Books

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Unlimited-Use  
Promotional Handouts

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Self-Study  
Online Tax Courses

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### 2026 SPECIALS

Three options that include the WebLibrary Plus with TaxBert, our AI Tax Research Assistant. Plus our most popular books combined into packages to save you money.

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Three options that include the WebLibrary Plus with TaxBert, our AI Tax Research Assistant!



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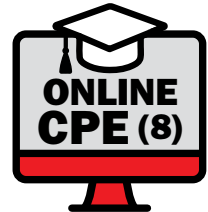
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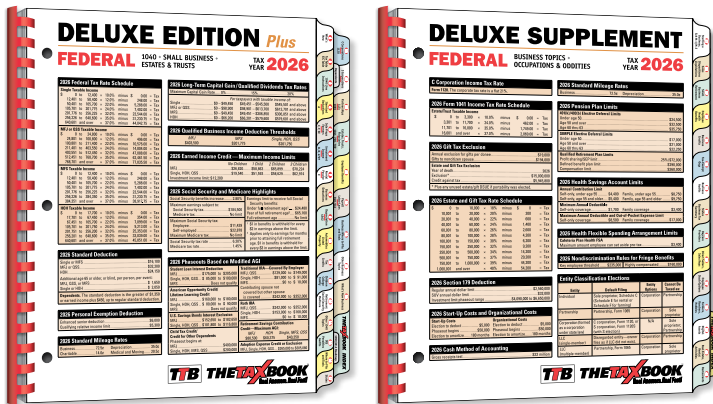
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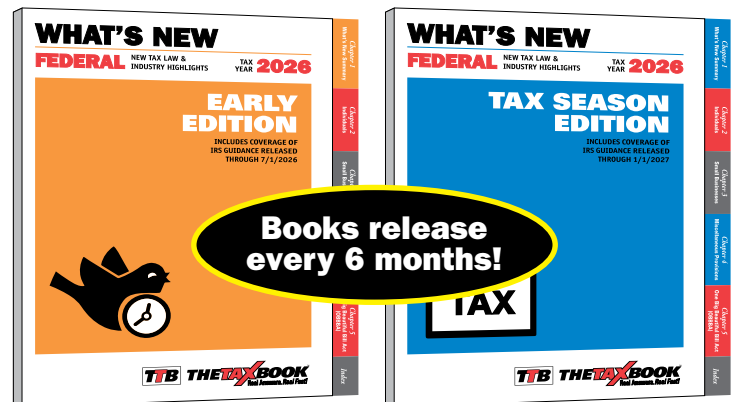
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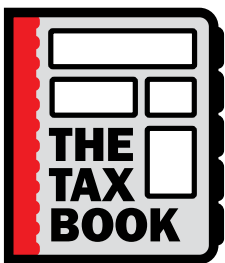
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**SCHEDULES:**

1, 2, 3, I-A, 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
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  - 26 What's New Business

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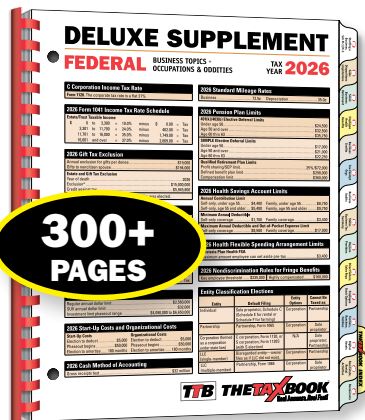
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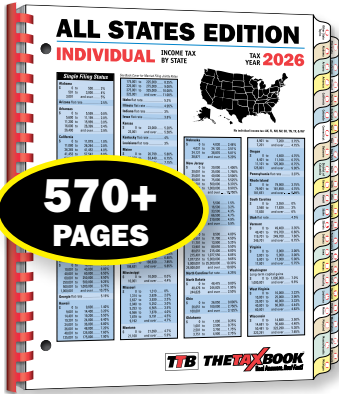
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- 27 Starting a Business, Sch M-1/M-3
- 28 Sales, Dispositions, Liquidations
- 29 Small Business Retirement
- 30 Employee Health Benefits
- 31 Business Credits
- 32 Tax-Exempt Organizations
- 33 Business Audit Strategies
- 34 States Business Tax Summary
- 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

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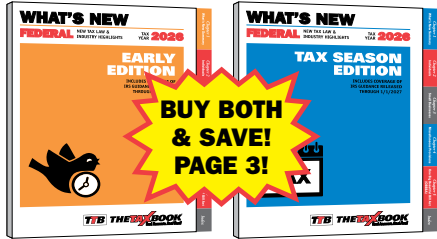
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## TOPICS BY STATE

- 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

## WHAT'S NEW



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- TAB TOPICS**
- 1 What's New Summary
  - 2 Individuals
  - 3 Small Businesses
  - 4 Miscellaneous Provision
  - 5 One Big Beautiful Bill Act

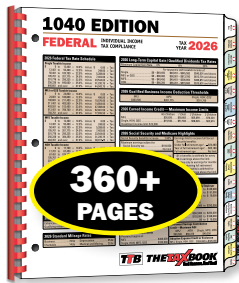
## FEDERAL COMPARISON

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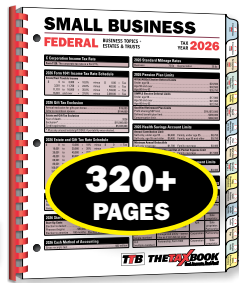
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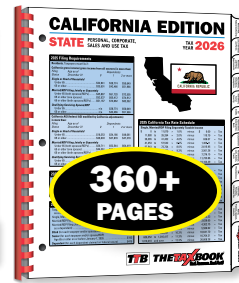
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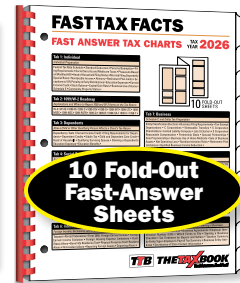
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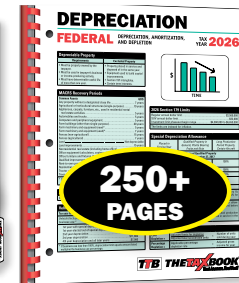
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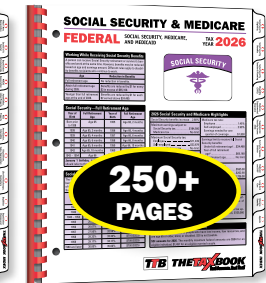
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- **Planning Tips:** Help your clients minimize tax liability.
- **Organizers:** Get your clients ready for tax season. Includes individual and business versions.
- **Updates:** Handouts are updated throughout the year to reflect new tax law.

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Use the current handouts to educate clients on tax topics pertaining to this year's tax return. Use next year's handouts for planning purposes once they're released late January.

- Place handouts in each client's folder before tax season. Add value during client engagements.
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### 1040

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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
<b>Families With Children*</b>
Filing Status
Foreign Bank and Financial Accounts
Gambling Log
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
<b>Itemized Deductions - Medical Expenses*</b>
Itemized Deductions - Taxes Paid
Kiddie Tax
Like-Kind Exchanges

### 1040 Cont.

Moving Expenses
Multi-State Taxation
New Tax Law Provisions (OBCCA - H.R.1)
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
Trump Accounts
Understanding How the IRS Contacts Taxpayers
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
<b>Employee or Independent Contractor*</b>
Employer Healthy Insurance Requirement
Excess Business Loss and Net Operating Loss (NOL)
Expense Reimbursements for Employees
Farm Expenses Worksheet
Farm Income Worksheet

### BUSINESS Cont.

Farm Inventory & 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 Deduction
Real Estate Professionals
Recordkeeping for Tax Purposes
Rental Income and Expense Worksheet
Rental Income and Expenses
Rental Real Estate QBI Safe Harbor
Repairs 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.

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Pension Income Planning
Saving for College

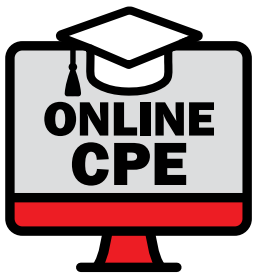
### RETIREMENT

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

### ORGANIZERS

C Corporation Tax Organizer
General Engagement Letter for Individual Tax Preparation
<b>Individual Taxpayer Organizer*</b>
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**20 HOURS**

**\$249**

**\$12.45/HOUR**

**8 HOURS**

**\$159**

**\$19.88/HOUR**

**2 HOURS**

**\$69**

**\$34.50/HOUR**

**ONLINE CPE HOURS DO NOT EXPIRE.**

Subject to CPE policy found at [thetaxbook.com/cpepolicy](http://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](http://thetaxbook.com/afsp)**

### FREE CPE WITH PURCHASE

**FREE!**

Product	Free Online CPE Hours	Retail Value
TheTaxBook Series	1 hour per book	<b>\$34.50</b>
WebLibrary Plus with TaxBert	5 hours per 1st user	<b>\$172.50</b>
WebLibrary Basic	2 hours per 1st user	<b>\$69.00</b>
Additional Users	1 hour per additional user	<b>\$34.50</b>

**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.NASBARRegistry.org](http://www.NASBARRegistry.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.

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# 2026 ONLINE CPE COURSES

**20** COURSES TO CHOOSE FROM

Complete learning objectives, course overviews, and other course information available at [thetaxbook.com/onlinecpe](http://thetaxbook.com/onlinecpe)

Upcoming 2026 courses are listed here. To explore currently available courses, please login to the Education Center at [education.thetaxbook.net](http://education.thetaxbook.net).

## 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.

### 1 NEW CONTENT! FEDERAL TAX UPDATE

Course Length: 3 Hours Release date: 7/15/26

This course includes recent federal tax law changes and updates, inflation adjustments for 2026 tax year, and more.

### 2 NEW CONTENT! HOT TOPICS

Course Length: 3 Hours Release date: 9/15/26

Stay up to date on the following topics: Adjustments to Income (Sch 1-A), Clients with Unpaid Taxes, Married Taxpayers

## COMPLIANCE COURSES

Credentialed tax professionals have CPE requirements dictated by the IRS and/or their state. We offer the AFTR course and California Tax Review course to fulfill specific CPE requirements, as well as our ethics courses below.

### 3 ANNUAL FEDERAL TAX REFRESHER (AFTR)

Course Length: 6 Hours Release date: 6/15/26

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](http://www.thetaxbook.com/AFTR).

### 4 CALIFORNIA TAX REVIEW

Course Length: 5 Hours Release date: 2/1/27

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.

## ETHICS COURSES

Several professional credentials require two hours of Ethics each year. We offer three course options to fulfil your Ethics requirement.

### 5 CIRCULAR 230 ETHICS

Course Length: 2 Hours Release date: 9/15/26

### 6 AVOID ETHICAL VIOLATIONS

Course Length: 2 Hours Release date: 9/15/26

### 7 DISCLOSING CLIENT INFORMATION

Course Length: 2 Hours Release date: 9/15/26

## 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.

### 8 INDIVIDUAL TAX PREP 101

Course Length: 5 Hours Release date: 9/15/26

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

### 9 INDIVIDUAL TAX PREP 201

Course Length: 4 Hours Release date: 9/15/26

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

### 10 NEW! INTRO TO BUSINESS ENTITIES

Course Length: 3 Hours Release date: 9/15/26

Review basic tax information about business entities, including sole proprietorships, LLCs, partnerships, and corporations.

## LIMITED TIME COURSES

To keep our CPE catalog fresh and responsive to your requests, our selection rotates annually. The limited time lineup will be available for one year following its debut.

### 11 RETURNING! ADVANCED BUSINESS TOPICS

Course Length: 4 Hours Release date: 9/15/26

### 12 RETURNING! AMENDED RETURNS

Course Length: 1 Hour Release date: 9/15/26

### 13 RETURNING! BASICS OF DEPRECIATION

Course Length: 2 Hours Release date: 9/15/26

### 14 RETURNING! CLIENTS WITH DEPENDENTS

Course Length: 4 Hours Release date: 9/15/26

### 15 DEATH OF A TAXPAYER

Course Length: 1 Hour Release date: 9/15/26

### 16 RETURNING! DISASTER LOSSES

Course Length: 1 Hour Release date: 9/15/26

### 17 RETURNING! ESTATES

Course Length: 2 Hours Release date: 9/15/26

### 18 RETURNING! QUALIFIED BUSINESS INCOME DEDUCTION

Course Length: 2 Hours Release date: 9/15/26

### 19 RETURNING! REAL ESTATE AND RENTAL ACTIVITIES

Course Length: 1 Hour Release date: 9/15/26

### 20 RETURNING! PREPARING S CORPORATION RETURNS

Course Length: 4 Hours Release date: 9/15/26

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

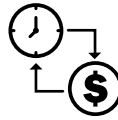
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## 5 FREE SERVICES WITH PURCHASE

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

[thetaxbook.com/freeservices](http://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**  
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**More details at [thetaxbook.com/autorenewal](http://thetaxbook.com/autorenewal)**

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Founded in 2005, TheTaxBook is a small, 100% American-owned company, located in Minnetonka, Minnesota. As a small business, 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!

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