

2025 Basic Personal & Business Tax Return Analysis

Harris Event Center/OBA
January 31, 2025

OBA MEMBERS: REGISTER ONLINE AT WWW.OBA.COM.

Earlybird fee by January 17, 2025: \$290
Regular fee after January 17, 2025: \$300
Non-members: \$600

The fee is per person and includes instruction, materials, breaks and lunch.

Cancellation requests must be made in writing and be received by January 17 to receive a full refund. A 50-percent refund will be given on all cancellations received by January 24. No refunds will be given on requests received after January 24; however, substitutions may be made.

BANK/CO. _____

PHONE _____

FAX _____

P.O. BOX _____ CITY _____

ZIP _____

NAME _____

TITLE _____

EMAIL _____

NAME _____

TITLE _____

EMAIL _____

NAME _____

TITLE _____

EMAIL _____

PAY BY CREDIT CARD:

For security reasons, please e-mail your registration form and credit card information to:

secure e-mail: secure@oba.com

BILL TO VISA MASTERCARD AMEX DISCOVER

CARDHOLDER NAME _____

CARD # _____

EXPIRATION DATE _____ CVC# _____

SIGNATURE _____

PAY BY CHECK:

Mail this form with payment to:

Oklahoma Bankers Association
P.O. Box 960173
Oklahoma City, OK 73196-0173

SCHEDULE

8:30 a.m. Registration

9:00 a.m. to 4:00 p.m. . Program

LOCATION

Harris Event Center at the OBA
643 N.E. 41st St., Oklahoma City 73105
405-424-5252

ACCOMMODATIONS

Oklahoma City
Residence Inn Bricktown
400 E. Reno Ave.
Oklahoma City, OK 73104
405-601-1700
Use Code OKB for rate of \$122, use code OKBA
Free breakfast, Self parking \$18/day.

Embassy Suites, OKC Medical Center
741 N Phillips Ave
405-239-3900
Ask for the OBA business rate of \$152
Made to order breakfast, Self parking \$14/day

** Hotel Rates are Subject to Change**

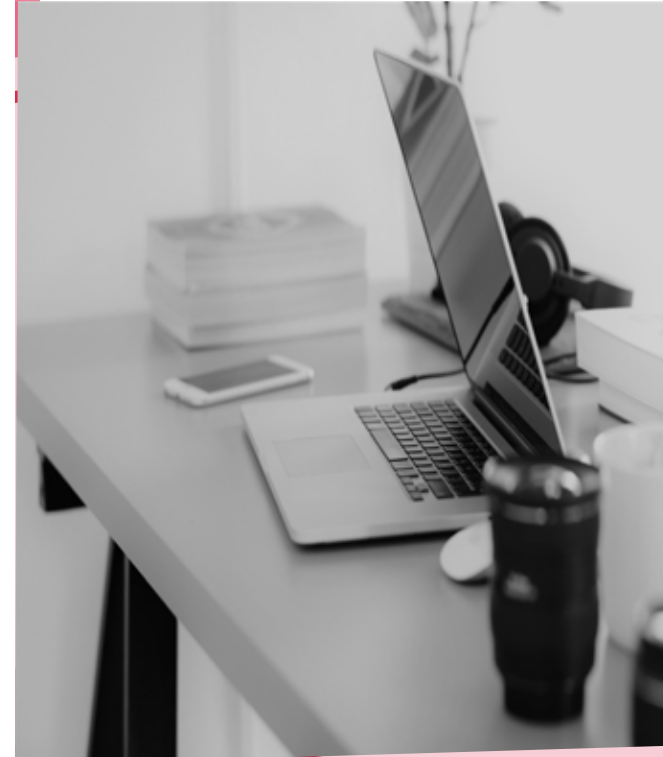
QUESTIONS?

Call Nancy, Debbie or Janis at the OBA for further information at 405-424-5252, or email Janis at janisr@oba.com.

If you have a disability that may impact your participation in this event, please forward a statement regarding any special needs to the OBA. We will contact you to discuss accommodations.



Basic Personal & Business Tax Return Analysis



JANUARY 31 • OKC



COURSE DESCRIPTION

Attend this proactive seminar and gain an understanding of the often complex and confusing topic of TAXES!

Bank personnel are required to obtain and properly interpret tax returns for both commercial and consumer lending purposes. The first part of this seminar will concentrate on personal tax return analysis while the second part will focus on the analysis of various business tax returns.

WHO SHOULD ATTEND

Commercial lenders, credit analysts, mortgage lenders consumer lenders, loan documentation specialists, branch managers, assistant branch managers, private bankers, and business development officers

REGISTRATION

To qualify for the early bird fee of \$290, you must register by January 17, 2025. The fee after January 17, 2025 is \$300. Non-member fee is \$600. The fee is per person; instruction, materials, breaks and lunch are provided.

OBJECTIVES

The first part includes:

- 1) Review the basic structure of the personal 1040 federal tax return (including the various schedules and K-1 forms),
- 2) Use analysis techniques to prepare a personal cash flow from information gleaned from the 1040 and the related schedules,
- 3) Discuss recent changes in the tax code including how they affect the bank's "individual" borrowers/guarantors, and
- 4) Describe how the 1040 tax return can be used to market the bank's products and services.

The second part includes:

- 1) Discuss the structure of a C corporation, S corporation, and Partnership (including LLC) tax return,
- 2) Analyze business tax returns and prepare cash flows for these entities,
- 3) Draw additional information from the business returns including identifying fraudulent tax returns,
- 4) Discuss updates in the tax code and proposed legislation and how they apply to businesses.

SPEAKER

David L. Osburn is the founder of Osburn & Associates, LLC, a Business Training and Contract CFO Firm that provides seminars, webinars, and keynote speeches for bankers, CPAs, credit managers, attorneys, and business owners on topics such as Banking/Finance/Credit, Negotiation Skills, Marketing, and Management Issues. Mr. Osburn's Contract CFO clients include medical practitioners, financial institutions, law firms, CPA firms, architects, real estate developers, and contractors.

His extensive professional background of over 30 years includes 19 years as a Business Trainer/Contract CFO and 16 years as a bank commercial lender including the position of Vice President/Senior Banking Officer. His banking credentials include loan underwriting, loan "work-out", management, and business development.

Mr. Osburn has been an adjunct college professor for over 30 years including Nevada State College and College of Southern Nevada.

He holds an MBA from Utah State University, a BS in Finance from Brigham Young University, and is a graduate of the ABA National Commercial Lending School held at the University of Oklahoma.

Additionally, Mr. Osburn holds the professional designation of Certified Credit & Risk Analyst (CCRA) as granted by the National Association of Credit Management (NACM).