

Explanation of changes to PowerPoint slides included in December 1, 2009 update. Current slides' titles end in '2009a' except:

02ScreeningInterviewing2009b
08IncomeBasics2009b
10CapitalGains2009b
11RetirementIncome2009b
12Rents&Royalty2009b
24EducationCredits2009b
ScheduleK-1-2009(Rev8)
ARRA2009e

05-06 Exemptions2009b

Schedule K1, 08IncomeBasics, 10Capital Gains, and 12Rents&Royalty The K-1 set was revised to include only the in scope items for Schedules B and D. Examples were added and standardized (the exact same slides appear in the 08 and 10 sets) Erroneous inclusion of K-1 rent and/or royalty information was deleted. Set 12 was changed to include only simple rent or royalty as reported on Form 1099-MISC. Foreign Tax Paid slide added to K-1 set.

02ScreeningInterviewing Added info to slide 2

11RetirementIncome Deleted Form RRB-1099 (Blue) and SSA-1099 (covered in Social Security set). Added Form CSA-1099. Added note to CSA-1099 regarding Schedule M for 2009.

24 EducationCredits Corrected slide 13 1098T sample

ARRA Corrected typo slide 8 (Pub 553). All slides were re-ordered to conform to 1040 line number sequence. Added extension of first time home buyers credit and new current homeowner credit. Also entries to Schedule L are transferred from Schedule A (i.e. entering property tax and new cars sales tax on the Schedule A detail worksheets)

05-06 Exemptions- added a slide to reflect the new rules in Pub 4012, chart C-3 for more than one person claiming a qualified child.

