# Quickfinder®

## The Tax Quick Reference Leader for 40 Years!

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- Available Now—Be ready when your clients call!
  - The new Quickfinder's Guide to the 2010 and Spring 2011 Tax Acts is available this summer. See p. 5
  - The Tax Planning for Individuals Quickfinder Handbook and Tax Planning for Businesses Quickfinder Handbook are available now. Don't wait until year end to get the 2011 tax planning guidance you need. See p. 8
- Experience—Quickfinder is the Original Tax Quick Reference Leader.
   Our Handbooks are written by professionals with years of practice experience, who have prepared thousands of returns!



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- Small Business Quickfinder Handbook, p. 3
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- Individuals—Special Tax Situations Quickfinder Handbook, p. 6
- Quickfinder's Guide to the 2010 and Spring 2011 Tax Acts, p. 5

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- Tax Planning for Businesses Quickfinder Handbook, p. 8
- Quickfinder's Guide to the 2010 and Spring 2011 Tax Acts, p. 5

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Regularly \$59, **now** \$40 per 1-year/12-issue subscription when you order with one or more of these Discount Bundles. That's a **32% Savings of** \$19 when you order with a bundle by 7/26/11! See p. 10 for more information.

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## 1040

## Quickfinder® Handbook

Individual Income Tax Preparation—the Original, the Best!



Discount Bundle! See p. 2 for details!

Pre-order your 2011 Tax Year Handbook now!

Available December 2011.

Product Qty.

2-10 11-20 21+ \$38 \$36

(Book prices listed are per unit of the same title.)

Book: Q40 (Print, CD, or Online)

See p. 11 or call 800.510.8997, option 1, for information on related CPE course, available as a free downloadable PDF. \$27 grading fee if you require CPE credit. See quickfinder.com or cl.thomsonreuters.com/ogs.

## **#1 Tax Quick Reference Handbook in America** for 40 Years!

The 1040 Quickfinder® Handbook has over 300 pages covering what you need to know to prepare federal individual income tax returns. We have been producing this Handbook for more than 40 years, and our accurate, easy-to-read content is the industry leader for independent tax professionals. Covers all aspects of preparing Form 1040, including tax changes and developments.

Also comes with numerous worksheets and a FREE Personal Income Tax Organizer and Deduction Finder<sup>©</sup>!

### Book tab titles include:

- Tax Table, EIC Table
- 2. State
- 3. Quick Facts, Worksheets, Where to File
- 4. Form 1040 Line-by-Line
- 5. Schedules A and B
- 6. Schedules C, F, and SE
- 7. Schedule D. Form 4797
- 8. Schedule E, Passive Activities, At-Risk
- 9. Form 2106, Travel, Meals and 17. What's New Entertainment

- 10. Form 4562, Depreciation, Section 179
- 11. Autos and Listed Property
- 12. Credits, AMT, and Special **Taxpayers**
- 13. Children, Education, and Divorce
- 14. Retirement and Social Security
- 15. Estate and Financial Planning
- 16. IRS, Penalties, Audits
- 18. Index

## America's Original Quick Reference Tax Handbook

## **Small Business** Ouickfinder® Handbook

The Original and the Best! Forms 1065, 1120, 1120S, 1041, 706, 709 and 990



Included in Discount Bundle See p. 2 for details!

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**Product Qty.** 

2-10 11-20 21+ \$41 \$38 \$36

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## An easy-to-use resource for tax professionals, financial planners, and small business owners!

Your first-stop resource for preparing tax returns for all small businesses! The easy-to-read explanations of the rules are supported by practice tips and tons of examples, all organized by types of entities for quick reference.

- · Also covers tax returns for estates, trusts and tax-exempt organizations.
- · Provides concise guidance on payroll, benefits, depreciation, formation, disposition, tax credit, and accounting issues.
- Includes filled-in tax forms and line-by-line coverage.

#### Book tab titles include:

- Reference, Worksheets
- 2. Partnerships (1065)
- 3. C Corporations (1120)
- 4. S Corporations (1120S)
- 5. Exempt Organizations (990)
- 6. LLCs and Other Business Entities
- 7. Fiduciary (1041)
- 8. Estate and Gift (706, 709)
- 9. Payroll (940, 941)
- 10. Depreciation and Amortization

- 11. Employee Benefit Plans
- 12. Accounting Methods and **Principles**
- 13. Starting a New Business
- 14. Acquisitions, Dispositions, and Liquidations
- 15. Deductions, Credits, and Books vs. Tax
- 16. Tax Planning
- 17. What's New
- 18. Index

## **Premium**

## Quickfinder® Handbook



Pre-order your 2011 Tax Year Handbook now!

Available December 2011

Product Qty.	1	2-10	11-20	21+	
Book: QPE (Print, CD, or Online)	\$65	\$62	\$59	\$57	

(Book prices listed are per unit of the same title.)

The *Premium Quickfinder Handbook* is a handy combination of the most important 1040 and Small Business topics you need to complete tax returns for individuals and businesses.

The Premium Quickfinder Handbook

- Has 27 chapters with descriptive topical tabs on how to prepare individual and small business returns.
- Includes over 500 pages of individual & small business quick reference tax information, all in one convenient source.
- Includes the traditional laminated cover and tabs, colored pages, tax humor, comb binding, tax tables, pocket insert.
- Is written by the leading Quickfinder authors who have served the tax preparation community for over 40 years.

Order online or CD version for 20% off, only \$52, with each print book!

See below for information on the related CPE course.

## Comparing the Premium, 1040, and Small Business Handbooks

Tab Title <sup>1</sup>	Premium	1040	Small Business
Tax Table, EIC Table	Tab 1	Tab 1	
State	Tab 2	Tab 2	
Quick Facts, Worksheets, Where to File	Tab 3	Tab 3	
Form 1040 Line-by-Line	Tab 4	Tab 4	
Schedules A and B	Tab 5	Tab 5	
Schedules C, F, and SE	Tab 6	Tab 6	
Schedule D and Form 4797	Tab 7	Tab 7	
Schedule E, Passive Activities, At-Risk	Tab 8	Tab 8	
Form 2106, Travel, Meals, & Entertainment	Tab 9	Tab 9	
Form 4562, Depreciation, Section 179	Tab 10 <sup>2</sup>	Tab 10 <sup>2</sup>	
Autos & Listed Property	Tab 11	Tab 11	
Tax Credits, AMT and Special Taxpayers	Tab 12	Tab 12	
Children, Education and Divorce	Tab 13	Tab 13	
Retirement & Social Security	Tab 14	Tab 14	
Estate & Financial Planning		Tab 15	
IRS, Penalties, Audits		Tab 16	
Business Reference and Worksheets	Tab 15		Tab A
Partnerships (1065)	Tab 16		Tab B
C Corporations (1120)	Tab 17		Tab C
S Corporations (1120S)	Tab 18		Tab D

Tab Title <sup>1</sup>	Premium	1040	Small Business		
Exempt Organizations (990)	Tab 19		Tab E		
LLC & Other Business Entities	Tab 20		Tab F		
Fiduciary (1041)	Tab 21		Tab G		
Estate and Gift (706/709)	Tab 22		Tab H		
Payroll (940/941)	Tab 23		Tab I		
Depreciation and Amortization <sup>2</sup>	Tab 10		Tab J <sup>2</sup>		
Employee Benefit Plans			Tab K		
Accounting Methods & Principles			Tab L		
Starting a New Business			Tab M		
Acquisitions, Dispositions, Liquidations			Tab N		
Business Deductions and Credits	Tab 24		Tab O		
Tax Planning			Tab P		
What's New	Tab 25	Tab 17	Tab Q		
Tax Practice Survey	Tab 26				
Index	Tab 27	Tab 18	Tab R		
Total Pages (approximate)	532	356	314		
Personal Income Tax Organizer and Deduction Finder®	✓	✓			
Supplemental Tax Organizers	✓				
<sup>1</sup> For a detailed description of each tab's contents, see quickfinder com					

 $<sup>^1\,</sup>$  For a detailed description of each tab's contents, see quickfinder.com.  $^2\,$  1040 & Small Business depreciation tabs combined into single Tab 10 in Premium.

**Premium Handbook CPE Course!** *Premium: 1040 and Small Business* is the CPE course for the *Premium Quickfinder Handbook,* a comprehensive look at the subjects covered in the *Handbook,* that provides 14 hours of continuing professional education credit. See p. 11 or call 800.510.8997, option 1, for information on related CPE courses, available as a free downloadable PDF. \$40 grading fee if you require CPE credit. See **quickfinder.com** or **cl.thomsonreuters.com/ogs**.

## Quickfinder's Guide to the 2010 and Spring 2011 Tax Acts



Order now!

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Quantity:	1	2-10	11-20	21+	
Book: Q11T (Print)	<del>\$49</del>	<del>\$46</del>	<del>\$39</del>	<del>\$36</del>	
Until 7/26/11	\$41	\$38	\$36	\$33	
(Book prices listed are per unit of the same title.)					

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Given how Congress has adopted the habit of enacting temporary and sometimes retroactive tax provisions throughout the year, it's not easy to stay up to date with the constantly changing tax laws. Whether it's extending or modifying expired tax provisions, enacting tax provisions intended to temporarily boost the economy, or making tax changes in connection with a broader reform like health care, the new tax laws keep coming. Therefore, to properly serve your clients, it's more important than ever to keep up with new tax legislation, and Quickfinder can help.

With Quickfinder's Guide to the 2010 and Spring 2011 Tax Acts, you'll get the information you need to stay on top of all of the need-to-know tax law changes enacted in 2010 and Spring 2011 (through May 31, 2011). For each Act's significant tax provisions, you'll get a brief description of the tax law before the Act, followed by discussion of the new law, with observations and examples. And for super-quick reference, you'll also get a Quickfinder table summarizing the key provisions of each Act.

#### Tax Acts covered include:

- Hiring Incentives to Restore Employment (HIRE) Act.
- 2010 Health Care Legislation.
- Small Business Jobs Act of 2010.
- 2010 Tax Relief Act.

## **IRA and Retirement Plan** Quickfinder® Handbook

The Quick Answers You Need about IRAs and **Retirement Plans in One Handy Source** 



Order your 2011 Edition now!

Available August 2011!

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See p. 11 or call 800.510.8997, option 1, for information on related CPE course, available as a free downloadable PDF. \$27 grading fee if you require CPE credit. See quickfinder.com or cl.thomsonreuters.com/ogs.

The tax rules for IRAs and retirement plans can be confusing, often differing from plan to plan and important amounts changing from year to year. This includes rules on eligibility, making contributions, limits on contributions and elective deferrals, covering employees, how distributions are taxed and when they are required, penalties, and selecting beneficiaries, just to name a few.

Get all the quick answers you need about IRAs and retirement plans in one handy source, as only Quickfinder can provide. In addition to concise discussions of important topics, you'll get loads of quick reference tables, charts, checklists, worksheets, examples and other useful information.

Whether responding to client questions, getting up to speed on the relevant rules, or simply looking up an amount, this Handbook will get you your answer quickly and accurately. No more searching through multiple publications or websites to find the answer you need. This *Handbook* is sure to save you valuable time. It includes:

- Traditional IRAs.
- · Roth IRAs.
- SIMPLE IRA Plans.
- SEP Plans.
- 401(k) and 403(b) Plans.
- · Other Qualified Plans.
- · Distributions.

- · Rollovers.
- · Beneficiaries.
- Choosing a Small Business Plan.
- Correcting Plan Errors.
- · IRS Materials.
- Index.

## Social Security and Medicare

## Quickfinder® Handbook



Pre-order vour 2012 Edition Handbook now!

Available December 2011.

The Social Security and Medicare Quickfinder Handbook provides CPAs, enrolled agents and other tax preparers with an affordable, easy-to-use Handbook for quickly and efficiently accessing the information their clients want to know about Social Security, Medicare, Medicaid, and Eldercare insurance.

Book tab titles include:

#### **Social Security Tabs**

- Benefits
- Retirement Benefits—Family
- Considerations
- Survivor Benefits
- Income (SSI)
- Determinations
- Recipient Income Tax Considerations

- Retirement Benefits—Eligibility
- · Retirement Benefits-Worker
- Benefits
- · Retirement Benefits-Planning
- · Disability Benefits
- Supplemental Security

#### **Product Qty:** 2-10 11-20 21+

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\$38

\$36

Book: QSM (Print, CD, or Online) \$43 (Book prices listed are per unit of the same title.)

#### Related Social Security and Medicare CPE course!

Covers the latest on Social Security and disability benefits available to workers and their families, as well as Medicare requirements, costs and coverage. 6 CPE credits. See p. 11 or call 800.510.8997, option 1, for information on related CPE course, available as a free downloadable PDF. \$27 grading fee if you require CPE credit. See quickfinder.com or cl.thomsonreuters.com/ogs.

## Individuals— **Special Tax Situations**

## Quickfinder® Handbook



Included in **Discount Bundles** See p. 2 for details!

Pre-order your 2011 Tax Year Handbook now!

Available December 2011.

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## Steers preparers through the maze of unique tax rules that apply to individuals due to occupations, investments, or certain life events.

For each type of taxpayer, you'll get a guick summary of the key tax rules and relevant IRS materials; definitions of key terms about that type of client, tax preparation guidance covering the unique rules and filing requirements for that specific type of taxpayer; time-saving tips, observations, strategies, and other preparation alerts; examples of reallife situations; and quick reference tables and charts.

#### The types of individuals covered in this *Handbook* include:

- Authors & writers
- Aliens—nonresident/resident
- · Bankrupt individuals
- Construction contractors
- Daycare providers
- Decedents
- Direct sellers (Mary Kay, Avon, Quixtar, etc.)
- Disabled taxpayers
- · Disaster victims
- Divorced taxpayers
- Elderly
- Executives
- Expatriates
- Farmers/ranchers
- Gamblers

- Household employers
- Military personnel
- Ministers/clergy
- Oil and gas investors
- Performing artists and athletes

Medicare and Medicaid Tabs

Eligibility and Enrollment

· Appeals and Other Matters

Health Plans

Drug Plans

Medicaid

Medigap

Index

**Insurance Tabs** 

· Long-Term Care

- Professionals
- Real estate agents
- Real estate owners & investors
- Restaurant owners
- Retailers
- · Statutory employees
- Stock traders/investors
- Students
- **Teachers**
- Transportation workers/truckers
- Waiters and waitresses

## All States Quickfinder® Handbook

### **Individual Income Tax Preparation**



Pre-order your 2011 Tax Year Handbook now!

Available February 2012.

## The *Original*All States Handbook!

Product Qty.	1	2–10	11–20	21+	
Book: QST (Print, CD, or Online)	\$76	\$72	\$68	\$63	
(Book prices listed are per unit of the sa	ame title.)				

## Quick handy access to over 500 pages of individual state tax filing instructions for all 50 states!

The All States Quickfinder® Handbook contains a complete, concise and consistent summary of instructions for filling out state individual income tax returns for all 50 states and the District of Columbia. Topics are presented in a consistent format, making it easy to find information regardless of the state.

Like all Quickfinder Handbooks, the *All States Quickfinder Handbook* uses clear language in an easy-to-use, tabbed format.

#### Each state tab includes:

- Filing Requirements
- Filing Status Information
- Residency Status Information
- Form Summaries for Resident, Part-Year and Nonresident Taxpayers
- Information about Income, Additions, Subtractions, Deductions, Exemptions and Credits
- Tax Tables and Tax Rate Schedules
- City, County and School District Information
- Worksheets
- Federal Attachments
- Return Due Dates
- Mailing Addresses
- Estimated Tax Information
- And Much More!

## **Depreciation**Quickfinder® Handbook

Quick answers to all your business property questions!



Included in
Discount Bundle!
See p. 2 for details!

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Available November 2011.

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## The Only Depreciation Handbook You Need

The Depreciation Quickfinder® Handbook covers your tax depreciation and business property questions—determining the right recovery periods, computing the right amount of depreciation, deciding whether expenses need to be capitalized, dealing with the special rules for autos and other listed property, claiming the Section 179 and bonus depreciation deductions, and much more.

- Covers property dispositions, including tricky tax rules for installment sales, like-kind exchanges and depreciation recapture.
- Provides loads of easy-to-read depreciation tables for MACRS (with or without bonus depreciation), ADS, AMT, and ACRS.

#### Book tab titles include:

- 1. Depreciable Property
- 2. MACRS
- 3. Other Depreciation Methods
- 4. MACRS Depreciation Tables
- 5. Section 179 Expensing
- 6. Vehicles and Listed Property
- 7. Real Property

- 8. Sales and Dispositions
- 9. Exchanging Property
- 10. Correcting Depreciation Errors
- 11. Intangible Assets
- 12. IRS Materials
- 13. Glossary, New Law
- 14. Index

## Tax Planning for Individuals Quickfinder® Handbook

Income, Estate and Gift Tax Planning for Individuals

Save time and get fast, accurate answers you need to help individual clients reduce their taxes!



Order your 2011 Handbook, **Available Now!** 

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Book: QIP (Print, CD, or Online)	\$43	\$41	\$38	\$36
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## Tax Planning for Businesses

Both Included in Discount Bundles, Available Now! See p. 2 for details! 100s of tax planning ideas to reduce individual clients' federal tax burdens; easy-to-read and to-the-point discussion of each strategy; quick, at-a-glance tables and charts; real-life examples; a unique 1040 Tax Planning Roadmap to use with any completed Form 1040; and Client Handouts.

The 2011 edition of the *Tax Planning for Individuals Quickfinder* 

The 2011 edition of the *Tax Planning for Individuals Quickfinder Handbook* covers various new developments impacting individuals including temporary extension of various Bush-era tax cuts, changes to the estate and gift tax rules, bonus depreciation and special Section 179 rules, and modified rules for the personal energy property credit.

A perfect companion to the 1040 Quickfinder Handbook, the

Tax Planning for Individuals Quickfinder Handbook includes:

#### Tab titles include:

- 1. Tables, Worksheets, Handouts
- 2. Form 1040 Roadmap
- 3. Residences & Vacation Homes
- 4. Sole Proprietors
- 5. Compensation
- 6. Stocks, Bonds & Mutual Funds
- 7. Real Estate
- 8. Children

- 9. Education
- 10. Divorce
- 11. Charitable Giving
- 12. Retirement Plans
- 13. Alternative Minimum Tax
- 14. Elderly
- 15. Estate & Gift Tax
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## Don't wait until year-end to get the 2011 tax planning guidance you need!

Through 7/26/11 get both of these great Quickfinder tax planning *Handbooks* and more **and Save 23%! See p. 2 for details.** 

You'll have over 550 pages of quick answers for your individual and small business clients. **Be ready when your clients call.** 

## for **Businesses** Quickfinder® Handbook

## Small Business Consulting and Tax Planning



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Your first stop when advising small business clients—full of money-saving tax planning strategies!

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See p. 11 or call 800.510.8997, option 1, for information on related CPE courses, available as a free downloadable PDF. \$27 grading fee if you require CPE credit. See **quickfinder.com** or **cl.thomsonreuters.com/ogs**.

Sort through the maze of business tax issues, stay up to speed on new business tax saving strategies, and leverage changing tax rules for your clients. The *Tax Planning for Businesses Quickfinder Handbook* includes:

- Small business tax planning for every business lifecycle phase.
- Information that addresses all types of business entities proprietorships, C and S corporations, partnerships, LLCs.
- Quick reference tables, charts, and time-saving Client Handouts.
- Quick reference material on many small business non-tax issues.

#### Tab titles include:

- 1. Handouts and Worksheets
- 2. Formation and Start-Up
- 3. Personnel and Compensation
- 4. Financing
- 5. Fringe Benefits
- 6. Retirement Plans
- 7. Travel/Entertainment, Home Office, Other Expenses
- 8. Dealings With Owner

- 9. Business Dispositions
- 10. Valuation
- 11. Buy/Sell Agreements
- 12. C Corporations
- 13. S Corporations
- 14. LLCs and Partnerships
- 15. Sole Proprietors
- 16. IRS, Tax Law Changes
- 17. Index

## California Tax Quickfinder® Handbook

A must for anyone who prepares California income tax returns.



Pre-order your 2011 Handbook now!

Available December 2011.

Product Qty.	1	2-10	11-20	21+	
Book: QCAP Regularly	<del>\$49</del>	<del>\$46</del>	<del>\$39</del>	<del>\$36</del>	
(Print Only) Until 7/26/11	\$41	\$38	\$36	\$33	

(Book prices listed are per unit of the same title.)

The *California Tax Quickfinder Handbook* covers Individuals, Corporations, and Pass-through entities. This *Handbook* has 24 chapters in a perfect-bound book, and includes more than 300 pages of individual and business tax information provided in one source.

#### California Tax Handbook Chapter Topics include the following:

2011 Tax Legislation; Introduction to California Taxation.

**INDIVIDUALS:** Who Must File; Tax Rates, Standard Deduction and Exemption Credit; Nonresident Issues; Income Inclusions; Income Exclusions; Adjustments to Income; Itemized Deductions; Accounting Periods, Sales and Exchanges; Tax Credits for Individuals.

**BUSINESS:** Accounting Periods, Methods, Inventory, etc.; Depreciation, Amortization, Depletion, Bad Debts; Corporations; S Corps, LLCs and Other Entities; Quitting Business in California; Gross Income; Deductions and Net Operating Loss; Multistate Taxation; Pass-Through Entities; Tax Credits for Businesses.

**OTHER:** Alternative Minimum Tax, Premature Distributions; Interest and Penalties; Property Tax.

# Accounting & Bookkeeping Quickfinder® Handbook

A time-saving resource tailored for Tax Professionals



Pre-order your 2011 Edition Handbook now!

Available October 2011.

 Product Qty.
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 2-10
 11-20
 21+

 Book: QTP (Print, CD, or Online)
 \$43
 \$41
 \$38
 \$36

(Book prices listed are per unit of the same title.)

## Quick answers to accounting and bookkeeping questions...for you...for your clients!

The Accounting and Bookkeeping Quickfinder Handbook includes guidance, worksheets, and tons of example journal entries showing you how to record many common transactions in the tax-basis accounting records. Also includes: bookkeeping basics; recording tax adjustments in the general ledger; and using software with client records.

#### Tab titles include:

- 1. References & Worksheets
- 2. Background Information
- 3. Business Start-Up Considerations
- 4. Working with Client Records
- 5. Entity Changes
- 6. Revenue & Receivables
- 7. Inventory
- 8. Fixed Assets
- 9. Investments

- 10. Intangible Assets
- 11. Liabilities
- 12. Owners' Equity
- 13. Expenses
- 14. Payroll & Employee Benefits
- 15. Interest Expense
- 16. Business Dispositions
- 17. Related Entity
  Transactions
- 18. Index

## Quickfinder® Tax Tables

#### Fast reference tools!

Pre-order your 2011 Tax Year Tables, available 12/2011!

These durable, laminated 6-page fold-out tools provide the Quickfinder tables and charts you use most often, allowing you to quickly answer client questions without flipping through pages. Quickfinder Tax Tables are the easy way to keep important facts and figures at your fingertips!



QLIP \$12—Tax Tables for Individual Returns
QLBP \$12—Tax Tables for Business Returns \*

## Quickfinder® **2012 Wall Calendar**

Critical tax dates, money-saving coupons, & more!

**QWCP**: \$12 each (print only) \* Available December 2011.

This monthly tax Calendar includes critical tax deadlines and major holidays. The Calendar also includes a monthly discount coupon on Quickfinder products, which can save you hundreds of dollars on Quickfinder products! Plus you'll find a monthly Quickfinder cartoon to put a smile on your face! Covers January 1, 2012 through December 31, 2012.

## Quickfinder® QuickPackage QF-X

For Individual or Business Returns

Pre-order 2012 edition now! Available 1/2012. QXIP \$12—QuickPackage QF-X for Individual Returns QXBP \$12—QuickPackage QF-X for Business Returns Until 7/26, order both for **only \$18!** 

### Three-ring binder format for easier copying!

The IRS no longer publishes Package X, the handy print collection of crucial tax forms and instructions you relied on for tax preparation—but don't despair! Quickfinder has gathered everything you need into two collections: QuickPackage QF-X for Individual Returns and QuickPackage QF-X for Business Returns.

With each *QuickPackage QF-X*, you get over 300 pages of IRS forms and instructions that are organized and easily found under logical tabs.

## **Quickfinder®**

## Client Quick Reference Tax & Wealth Schedules



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