

## **Form 5471 Workshop: Dealing with New TCJA Complexities**

**Friday, June 28, 2019**

**8:00 am to noon**

### **Webinar or Onsite options**

A significant business tax increase of the TCJA is imposed on the foreign income of U.S. shareholders of foreign companies. Form 5471, with its longstanding \$10,000 penalty, is now a tax return where this tax is reflected. If your company or clients operate internationally, this class is critical to help you understand and successfully address the changes to the 2018 Form 5471 and its schedules, and to be aware of planning considerations.

#### **Learning Objectives:**

- Recognize how Form 5471 has changed due to the Tax Cuts and Jobs Act changes including GILTI, the section 250 deduction and the BEAT
- Determine the steps for preparing Form 5471 under the TCJA
- Determine when Form 5471 is required and the consequences of non-filing or filing inaccurate forms
- Identify how to correct past mistakes

#### **Presenters:**

- Aaron Ashcraft, Partner – EY
- Christine Ballard, Partner – Moss Adams; moderator
- Jason Hoerner, Principal - KPMG
- Chad Hungerford, Partner - Deloitte
- Todd Juarez, Senior Manager - Moss Adams
- Rob Kovacev, Partner - Norton Rose Fulbright
- Anthony Pagtama, Director – PwC

#### **Registration and Participation Options:**

1. Webinar - Register at [CalCPA website](#):
  - Webinar starts at 8:30 am (log in by at least 8:20 am), ends at noon
  - CalCPA member price is \$150; TEI members also get \$150 price with discount code: **TEI**
  - Non-CalCPA/non-TEI member price is \$201
  - Register: <https://tinyurl.com/y5bdlpeg> [Registering a few TEI members who are not CalCPA members, you can call (800) 922-5272 to register.]
2. Onsite/in person attendance at CalCPA headquarters in Burlingame [Note this new location from what was advertised before June 10.]:
  - 8 am light breakfast and check-in; program starts at 8:30 am, ends at noon
  - Noon to 1:00 pm – lunch and networking with presenters and others
  - Webinar broadcast from this location
  - Seating is limited. Price is \$150.
  - <http://www.sjsu.edu/taxinstitute/>
  - Register at <https://commerce.cashnet.com/COBJSJSU>

**Questions:** Professor Annette Nellen at [Annette.nellen@sjsu.edu](mailto:Annette.nellen@sjsu.edu).

<http://www.sjsu.edu/taxinstitute/>