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EDUCATION CENTER

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2014 GreenTraderTax Webinar Recordings

This item comes with a user name and password to access our 2013 Premium Webinar recordings.
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Just click on the links below for all content and it will be accessible to you.
Some of the Webinars were sponsored and hosted by trading schools or brokerage firms and they may host the Webinar recording. Most of the recordings are hosted at GreenTraderTax and we are in control of the recording.

Fri., Jan. 17, 2014, 1:00 – 2:00 pm ET
New IRS guidance on SE tax deductions affects partnership AGI-deduction strategies
Hosted by GreenTraderTax with Green NFH CPAs/Managing Members Robert A. Green, CPA & Darren L. Neuschwander, CPA, co-authors of the related blog.
Click here to download or stream (91 MB, time 1:00) the recording in our Amazon Cloud.
Click here for the related blog.

Tue, Jan 14, 2014 4:15 PM - 5:30 PM EST
Kick Off To 2013 Tax Filings For Traders
Hosted by GreenTraderTax and presented by Robert A. Green, CPA
Panelists: Green NFH Members/CPAs Darren Neuschwander and Adam Manning
Click here to download or stream (137 MB, time 1:20) the recording in our Amazon Cloud.
Click here for the related blog and Webinar description.
Recording notes. We explained our GreenInvestorTax service with a fixed low pricing option. Towards the end, we covered the new blog "New IRS guidance on SE tax deductions affects partnership AGI-deduction strategies." We cover cost-basis reporting, 1099-B problems, TradeLog software, Section 1256, forex, trader tax status and Section 475 loss issues with the IRS, option traders, ways to get organized early, tax season strategies and more.

Wed., Dec. 4, 2013, 4:15 - 5:30 pm ET
Maximize year-end tax planning and set yourself up right for 2014
Hosted by GreenTraderTax and presented by Robert A. Green, CPA
Panelists: Green NFH Members/CPAs Darren Neuschwander and Adam Manning
Click here to download or stream (112 MB, time 1:16) the recording in our Amazon Cloud.
We work off a Word document of content, including consultation notes with a client where we dealt with the below agenda issues.

- Qualify for trader tax status in light of recent trader tax court cases Nelson and Endicott.
- Avoid wash sale income in your individual accounts by converting to trading in an entity on Jan. 1, 2014.
- Use TradeLog's new Wash Sale Loss report to steer clear of potential wash sales.
- Use a trading entity to create the earned income needed for individual AGI deductions like health insurance premiums and retirement plans.
- Utilize lower marginal tax rates, itemized deductions and ordinary losses with a Roth IRA conversion before year-end.
- Limit underestimated tax payment penalties with special strategies.

Mon., Nov. 18, 2013, 4:15 - 5:30 pm ET
Audits of Hedge Funds: Benefits, Challenges, Process & Pitfalls
Hosted by GreenTraderTax with Robert A. Green, CPA
Panelists: Hedge fund auditing professionals from our network member Warren Averett, LLC, including Kristine Pistininzi CPA, Jay Robbins CPA and Charles Bailey CPA & Audit Partner
Click here to download or stream (129 MB, time 1:20) the recording in our Amazon Cloud.
Click here to read our blog on this subject.

WEBINARS

Highlighted Recent Recordings:
*Audits of Performance Records
*New IRS guidance on SE tax deductions affects partnership AGI-deduction strategies
*Kick-Off to 2013 Tax-Filings for Traders
*Audits of Hedge Funds
*ObamaCare taxes are starting to affect traders
*The Tax Court Was Right To Deny Endicott Trader Tax Status
* Investment management: Key updates
*Learn the DOs and DON'Ts of using IRAs and other retirement plans

Trader Tax Center

Tax Newsletter & Calculators

BLOG

Highlights (see the full archive):

Jan 14: New IRS guidance on SE tax deductions affects partnership AGI-deduction strategies. Read More

Jan 9: A major tax reform bill in 2014 is unlikely, and "tax extenders" may be history, too. Read More

Jan 7: Kick off to 2013 tax filings for traders. Read More

Dec 4: IRS final regulations for Net Investment Tax help traders. Read More

Dec 3: Bitcoin is a hot commodity, but is it taxed like commodities, assets, or currencies? Read More

Nov 15: Another non-business trader gets busted in tax court trying to cheat the IRS. Read More

Nov 6: Hedge fund investors depend on "assurance" from quality independent CPA firms. Read More

Oct 29: ObamaCare taxes are starting to affect traders. Read More

Sept 15: Not Easy For New Yorkers To Escape Big Apple's Tax Bite. Read More

August 30: The Tax Court Was Right To Deny Endicott Trader Tax Status Read More

August 18: Common trader tax mistakes Read More

July 24: Learn the DOs and DON'Ts of using IRAs and other

Tues., Nov. 12, 2013, 4:15 - 5:30 pm ET
Year-end tax planning for 2013
Hosted by GreenTraderTax and presented by Robert A. Green, CPA
Panelists: Green NFH Members/CPAs Darren Neuschwander and Adam Manning
Click here to download or stream (134 MB, time 1:23) the recording in our Amazon Cloud.
Click here to read our blog on this subject.

Wed., Nov. 6, 2013, 4:15 - 5:30 pm ET
ObamaCare taxes are starting to affect traders
Hosted by GreenTraderTax and presented by Robert A. Green, CPA
Click here to download or stream (89.6 MB, time 1:29) the recording in our Amazon Cloud.
Click here to read our blog on this subject.

Thurs., Sept. 26, 2013, 4:00 - 5:00 pm ET
Taxes for Active Traders
Hosted by TradeLog
Join CPAs Robert A. Green and Darren Neuschwander, Managing Members of Green NFH, LLC
Click here to download or stream (116 MB, time 1:00) the recording in our Amazon Cloud.
See the full agenda in the introduction from TradeLog. Includes: Broker-issued Form 1099B download problem and TradeLog solution (blog); benefits of Section 475 MTM ordinary gain or loss treatment on securities; business deduction treatment for traders qualifying for trader tax status; and the value of a good CPA firm, especially ours for business traders.

Tuesday, Sept. 10, 2013, 4:15 - 5:15 pm ET
The Tax Court Was Right To Deny Endicott Trader Tax Status
Join CPAs Robert A. Green and Darren Neuschwander, Managing Members of Green NFH, LLC
Click here to download or stream (126 MB, time 1:15) the recording in our Amazon Cloud.
Click here to read the related blog dated Aug. 30.
Description: In this Webinar, we review a Word file containing the actual tax court case. We read important sentences highlighted in yellow, and discuss several comments added by Green. All options traders and other traders who manage their investments and want to claim trader tax status need to watch this recording. We added this Word file as a PDF to Green's 2013 Trader Tax Guide.

Tues, Aug. 27, 2013, 4:15 PM - 5:30 PM EDT
Investment management: Key updates on regulation, tax, compliance and business
Host Robert A. Green, CPA & CEO of GreenTraderTax and guest Brent Gillett of InvestmentLawGroup.com
Description: Panelists will discuss current hedge fund news and developments for investment management, including federal and state regulatory changes for securities, NFA changes for futures and forex and more.
Click here to download or stream (105 MB, time 1:20) the recording in our Amazon Cloud.
See the agenda in the first few power point slides presented.

Tuesday, Aug. 13, 2013 (Part I) and Aug. 20 (Part II)
Trader tax compliance/preparation: Key updates on 2012 tax return filings and 2013 tax planning - two part series
Join CPAs Robert A. Green and Darren Neuschwander, Managing Members of Green NFH, LLC
Mr. Green will interview Mr. Neuschwander in his role as head of tax compliance for our CPA firm.
Description: 2012 income tax returns on extension are due Sept. 15, 2013 for S-Corps and partnerships and Oct. 15, 2013 for individuals. Many small business traders have complex tax affairs so they generally file their tax returns close to these tax deadlines. Time is running out! If you rushed to file earlier in the year, just after Oct. 15th is a good time to consider a "checkup" with us to be sure you received every tax break you were entitled to. Early November is also an excellent time to focus on 2013 year-end tax planning instead of waiting until the year-end holidays.
Power Point used for Part I & Part II. See the Agenda in the power point.

- **Part I**: **Most common mistakes for traders and best deductions for traders.**
  Click here to download or stream (72 MB, time 1:15) the recording in our Amazon Cloud.
  Click here for Aug. 18 blog: Common trader tax mistakes
- **Part II - education expenses, cost-basis reporting and Form 8949, AGI deductions, retirement plans, amended returns** and more
  Click here to download or stream (74 MB, time 1:15) the recording in our Amazon Cloud.

Thurs. Aug 1, 1:00 - 2:00 PM ET
eTradingExpo, a special two-day event produced by MoneyShow.com.
Trader Entities presented by Robert Green, CPA
A recording should be available soon from eTrading Expo or the MoneyShow.com Website.

Tues. July 30, @ 1:00 - 2:00 pm ET
Learn the DOs and DON'Ts of using IRAs and other retirement plans in trading activities and alternative investments
Host: Robert A. Green, CPA
Panelists: Employee Benefit Attorneys Richard Matta of Groom Law Group, and Louis Barr of counsel to Green NFH, LLC.
Click here to read our related blog
Click here to download or stream (98 MB, approx time 1:10) the recording in our Amazon Cloud.
You may need GoToMeeting.com/codec plug-in for PC users (see note).

Tuesday, July 23 @ 4:30 pm ET
Free Closing Bell Webinar: GreenTraderTax
Host: Cyber Trading University
Trader entities
Recording should be coming soon.

Friday, June 28, @ 12 pm ET
Business Traders Benefit From Trading Entities.
Learn how to set up an entity in the best way customized for your special needs.
Presented by Robert A. Green, CPA
Hosted by Rockwell Trading
Click here for the Webinar recording.

retirement plans in trading activities and alternative investments Read More

March 31: PFG investors can deduct theft losses on 2012 tax returns with Rev. Proc. 2009-20 safe harbor relief. That's great news! Read More

March 5: Caution, downloading securities Form 1099-Bs into TurboTax often leads to incorrect tax filings Read More

Sept 5: High-income traders and ObamaCare's 3.8% Medicare tax Read More

GreenTrader blog archive, Forbes blog, Benzinga blog.

Click here for information on entities for traders.

Tuesday, June 25 @ 7:30 pm Eastern (4:30 pm Pacific)
Tax Planning for Net Investment Income and other smart tax planning moves for 2013
Hosted by TraderInterviews.com
Presented by Robert A. Green, CPA
Click here to watch the recording (60 minutes)
Click here for the short presentation materials.
Click here for content on Net Investment Income and Tax
We had some good Q&A from the moderator Tim Bourquin.
Green gave an update on the financial transaction tax in Europe and the U.S.

Friday June 7th and Saturday June 8th 10am-6pm est
RealTradersWebinar Mid-Year 2013 Event with over 14 speakers.
Here are the recordings of all 15 experts covering everything from following the insiders to psychology to in depth setups and the real scoop on support and resistance for forex, options, stock, futures:
Robert Green's session is day 1.

- http://www.realtraderswebinar.com/day1/
- http://www.realtraderswebinar.com/day2/

Price Action Trading and Trading Tax LIVE Event
RealTradersWebinar May 9th Live Event, 12-5pm EST
Robert A. Green, CPA is the first presenter for 45 minutes, starting at 12pm ET
Smart tax planning moves for 2013, entities, and the new Medicare tax on uneared income
Click here for the recording. Green is the first speaker.

Thu, May 2, 2013 1:00 PM - 2:15 PM EDT
A Trading Business Entity Is Better Than A Sole Proprietorship
Hosted by GreenTraderTax and Presented by Robert A. Green, CPA
Click here to download or stream (118 MB, approx time 1:20) the recording in our Amazon Cloud.
You might need GoToMeeting.com/codec plug-in for PC users (see note).

April 10, Wed. 01:00 - 02:00 pm ET
Questions & Answers Before April 15th
Answers from Robert A. Green, CPA
Click here to download or stream (107 MB, approx time 1:00) the recording in our Amazon Cloud.
You might need GoToMeeting.com/codec plug-in for PC users (see note).

April 4, Thurs. 11:00 am - 12:00 pm Central Time
Trader Tax Benefits & Elections To Make By April 15
Promoted by Panelist Dan Sheridan of SheridanMentoring.com
Presented by: Robert A. Green, CPA
Click here to download or stream (132 MB, approx time 1:09) the recording in our Amazon Cloud.
You might need GoToMeeting.com/codec plug-in for PC users (see note).
It's a good one!

April 2, Tues. 1:00 pm - 1:45 pm EDT
2013 Trader Tax Law: What You Need to Know NOW
Hosted & Promoted by MoneyShow.com
Presented by: Robert A. Green, CPA
Click here to watch the recording at eMoneyShow.

March 20 -- 2012 Tax Extensions & Section 475 MTM Elections
Hosted & Promoted by MoneyShow.com
Presented by: Robert A. Green, CPA
Click here to watch the recording on MoneyShow.com
Click here to download or stream (120 MB, approx time 1:00) the recording in our Amazon Cloud.
You might need GoToMeeting.com/codec plug-in for PC users (see note).

- Mr. Green begins the Webinar focusing on the need to file 2012 automatic extensions as we approach the April 15th eadline. Section 475 MTM elecions are due on that date, too.
  Click here for the extension blog Mr. Green mentions on the Webinar.

March 13 -- 2012 Trader Tax Preparation Examples & Tips
Promoted by DayTradingUniversity.com
Presented by: Robert A. Green, CPA & Darren Neuschwander, CPA
Click here to download or stream (339 MB, approx time 1:22) from our Amazon Cloud.
It's a big file this week, so please be patient with our recording, it's worthwhile.
You need GoToMeeting.com/codec plug-in for PC users (see note).
During the Webinar, we login to the Platinum Package and inadvertently show the user name and password. We changed the user and password afterwards, which is the reason for our delay in publishing this recording. The recording will be free for a week or so.

We're very happy with how this Webinar turned out. Before you turn to a local tax preparer or self-prepare and file your 2012 tax returns, we strongly advise watching this Webinar recording.

- **Trader tax return examples:** For the first time ever, we show tax return examples from *2013 GTT Guide: 2012 Tax Return Examples for Securities Traders (Individual and Entities)*. We show how to prepare a 2012 LLC partnership tax return for a trading business and compare it to a 2012 sole proprietorship trader tax return. We point out many areas requiring special attention, common mistakes made by local accountants, tips, pitfalls and more.
- **Form 8949, broker-issued 1099Bs, and wash sales:** We explain important updates to our content on wash-sale reporting by brokers and cover recent additions to our March 4 blog Caution, downloading securities Form 1099-Bs into TurboTax often leads to incorrect tax filings.
- **TradeLog accounting:** We explain various types of manual adjustments that you should make to TradeLog files, which otherwise automates accounting by downloading brokerage firm debits and credits. We discuss the options traders have at tax time on trade accounting solutions and how to find the best solution for you.

- **Extensions:** We go over the best tax-filing strategies at this late date, with the tax extension deadline right around the corner. We explain how to file a valid extension in good faith, file key tax elections on time and avoid problems later on like late-filing and late-payment penalties, which can be very high.

Mar. 5, Tuesday, 1:00 - 2:00 pm ET
Active Forex Traders Benefit From Trader Tax Status & Entities
Sponsored by FXCM
Presented by: Robert A. Green, CPA
Click here to download or stream (117 MB, approx time 1:15) from our Amazon Cloud.
It's a big file this week, so please be patient with our recording, it's worthwhile.
Sorry, you may need GoToMeeting.com/codec plug-in for PC users (see note).

Feb. 27, Wed, 1:00 - 2:00 pm ET
Forex Tax Treatment and CFTC Forex Trading Rules for Americans
Sponsored by FXCM
Presented by: Robert A. Green, CPA
Click here to download or stream (287 MB, approx time 1:24) from our Amazon Cloud.
It's a big file this week, so please be patient with our recording, it's worthwhile.
Sorry, you may need GoToMeeting.com/codec plug-in for PC users (see note).
Over 400 attendees made very positive comments about this Webinar. This recording is a *must* for all forex traders in 2012 and 2013.

Feb. 14, Thursday, 4:00 - 5:00 pm ET
Tax Benefits from Trading Section 1256 Contracts & Trader Tax Status Reporting Tips
Hosted by Rockwell Trading
Presented by: Robert A. Green, CPA
Robert showcases *Green's 2013 Trader Tax Guide*, covering content in the Executive Summary
Click here to watch the recording on the Rockwell Trading Website.

Feb. 12, Tuesday, 4:30 - 5:30 pm ET
How Traders Deduct Education & The Best Entities For Traders
Closing Bell at Cyber Trading University **(CTU)**
Presented By: Robert A. Green
Click here to watch the Webinar with power point presentation care of Cyber Trading University.

Kick-Off To Tax Season Part I: Highlights From Green's 2013 Trader Tax Guide
Date: Thursday, February 7, 2013, Time: 4:05 PM - 5:30 PM EST
Hosts: CPAs Robert A. Green and Darren L. Neuschwander of GreenTraderTax and Green NFH, LLC
Click here to download or stream (287 MB, approx time 1:24) from our Amazon Cloud.
It's a big file this week, so please be patient with our recording, it's worthwhile.
Sorry, you may need GoToMeeting.com/codec plug-in for PC users (see note).
Read our related blog article: Green's 2013 Trader Tax Guide is our best ever

Wed. Jan 16, 2013, 5:15 to 6:00 pm ET
Post fiscal cliff tax planning for traders and key trader tax issues to consider for 2012 tax compliance
Presenter: Robert A. Green, CPA
Hosted by TradingPub.com.
Click here to watch the recording at TradingPub. Scroll down to Session II.
Start at 04:50, as we had some set-up time.

Wednesday, January 9, 2013, 4:00 PM - 5:30 PM EST
Post fiscal cliff tax planning for traders and key trader tax issues to consider for 2012 tax preparation
Hosts: CPAs Robert A. Green and Darren L. Neuschwander of GreenTraderTax and Green NFH, LLC
Click here to download or stream (147 MB, approx time 1:45) from our Amazon Cloud.
Read our related blog article: Post fiscal cliff tax planning for traders.

- Part I (start to 0:52:00) **-** Post fiscal cliff tax planning for traders
- Part II (0:52:00 to end). Key trader tax issues to consider for 2012 tax preparation. Including,
  - Issuing 1099-Misc. to vendors.
  - A general ledger is best for your entire accounting. Like QuickBooks (QB). Excel worksheets may leave out many expenses. QB tips to lower our preparation fees.
  - Tax information statements and 1099-Bs problems expected again this year.
  - Use TradeLog software for trade accounting on securities. TradeLog updates and developments.
  - Update on cost-basis reporting problems for securities on 1099Bs and IRS form 8949. Mutual fund cost-basis is included for 2012. Will taxpayers be audited for 2011 tax returns on this?
  - Trader tax status issues
  - Trader entity tax compliance issues
  - Use our e-organizer to get all available deductions, credits and tax breaks.
  - Review of how we work with clients and our deadlines.
  - January 15, 2013 Q4 estimated taxes for 2012.
  - Q&A

Wed. Dec. 18, 2012, 12:00 PM - 1:00 PM EDT
Close out 2012 with smart year-end tax planning, and start 2013 with a new entity
Presenter: Robert A. Green, CPA
RealTradersWebinar.com full afternoon event.
Click here for separate recordings of each hourly session. Green's session is first.
Read our related blog article: Form a new trading entity for Jan. 1, 2013 and reap many tax benefits

Thursday, Dec. 13, 2012, 1:00 PM - 2:15 PM EDT
Year-End Tax Planning For Traders & Non-Traders,
Investment Management Update, and Q&A
Host: Robert A. Green. Other Panelists: Darren L. Neuschwander of Green NFH, LLC and attorney Brent S. Gillett of Investment Law Group.
Click here to download or stream (207 MB, approx time 1:35) from our Amazon Cloud.
Sorry, you may need GoToMeeting.com/codec plug-in for PC users (see note).

Click here for invitation with description of this Webinar.

Thursday, Dec. 6, 2012, 1:00 PM - 2:15 PM EDT
Close out 2012 with smart year-end tax planning, and start 2013 with a new entity
Hosts Robert A. Green, CPA & Darren L. Neuschwander, CPA
Click here to download or stream (111 MB, approx time 1:35) from our Amazon Cloud.
Click here for invitation with description of this Webinar.
Read our related blog article: Form a new trading entity for Jan. 1, 2013 and reap many tax benefits

- **Testimonial.** From: Sxx Eyyy [mailto:sxEx@aol.com]
  Sent: Thursday, December 06, 2012 5:17 PM
  Subject: Today's Webinar; Mr. Green / Mr. Neuschwander-
  Thanks very much for the very informative webinar today as you covered quite a variety of material for end-of-year tax planning, FTT, etc. I appreciate your presentation and now have many more questions that were prompted by the discussion. I will sign up tonight to get on Mr. Green's calendar as I would like to set up an entity to begin 2013. Having just said that, I will write down as many of my questions that I can think of as well. Again thanks for your webinar and I will be online tonight to also sign the petition against the FTT and sned a letter to my Congressman. Sincerely,
  Sxxx Eyyy

Thursday, Sept. 27, 2012, 1:00 PM - 2:15 PM EDT
Last Chance to Form an Entity for Meaningful Tax Benefits in 2012
Host Robert A. Green, CPA
Click here to download or stream (126 MB, approx time 1:25) from our Amazon Cloud.
Click here for our blog article in support of this Webinar
Comment: No power point slides, but lots of Q&A and its very informative. You can just listen without watching if you like. We just show the blog above and walk through it. For power point slides on entities, watch our Best Entities Webinar below from June 21, 2012. Also, read the entities section of Green's 2012 Trader Tax Guide and see our entity services page.
Testimonial: From: sh@xxx.com, Sent: Thursday, September 27, 2012 2:35 PM, To: 'Robert A. Green, CPA, CEO', Subject: tax entity, Hello Robert, Very insightful webinar today! If I form a GP entity through you, is xxxxx? Thanks, Sxxx Hyyyy

Thursday, August 16, 2012, 1:15 PM - 2:30 PM EDT
Updates: Trader Tax, Form 8949 vs. 1099-B problems, Forex & Investment Management
Host Robert A. Green, CPA and brief update on investment management from Brent Gillett, Attorney (at 52 minutes into the session).
Click here to download or stream (235 MB, approx time 1:30). *Sorry, you may need GoToMeeting.com/codec plug-in for PC users (see note).*
Click here for the full description and to register.
Special Webinar Notes: Green showed and discussed our new "Tax Return Footnote: 2011 Form 8949 and Cost-Basis Reporting Rules" which we just published in our "2012 GTT Guide: 2011 Tax Return Examples for Securities Traders (Individual and Entities)." TradeLog users need this footnote with Form 8949. See a wonderful new testimonial about TradeLog and our advice here. Green also discussed a similar issue about 1099 confusion for forex forwards on our blog today "Why do forex forward dealers issue 1099s, yet retail spot forex brokers do not?"
Testimonial: From: jxxx.cxpyyyy@gmail.com, Sent: Friday, August 17, 2012 5:06 PM
Subject: 8/16/12 Webinair - Form 8949 vs. 1099-B. Thank you for an excellent program. My second webinair with your firm. I think that Robert Green is an excellent instructor, keeps it interesting and entertaining, and that says a lot for this material!
Jxxx Pyyyyy

Wed., Jul 18, 2012, 3:30 PM - 4:30 PM CDT
Taxes for Options Traders
Click here to download or stream (110 MB, time 1:19). *Sorry, you may need GoToMeeting.com/codec plug-in for PC users (see note).*
For MarketTaker.com users and others were invited, too.
Dan Passarelli of MarketTaker.com joined Robert Green for some discussion.
Darren Neuschwander, CPA, Co-Managing Member of Green NFH, LLC joined as a panelist, too.
Description: This Webinar covers all types of options. Equity options are securities, index and futures options are Section 1256 contracts, and ETF options can qualify for lower tax rates in Section 1256, too. If you trade options, don't miss this class.
Click here for a good article from Smart Money on tax treatment for options.

Tues., Jul 17, 2012, 4:15 PM - 5:30 PM EDT
Cost-Basis Reporting Update: How To File Form 8949 With 1099-B Differences
Click here to download or stream (301 MB, time 1:30).
Click here for our blog update on this subject. It includes the Webinar FAQs, including the answers.
Description: If you file a Form 8949 reporting securities trades, or prepare one for a tax client, you should not proceed without watching this Webinar. Learn about the problems with IRS cost-basis reporting rules, differences and errors on 1099-Bs, and huge problems with wash sale reporting. Otherwise, proceed at your own risk.

Thurs, June 28, 2012, Time: 8:00 PM - 9:30 PM EDT
Tax Benefits from Trading Futures & Section 1256 Contracts
Sponsored by Rockwell Trading
Click here for the recording.
Click here for the full description of this Webinar content on our blog. See the blog postscript on one down side of trading futures, **weaker money protection**. MF Global and PFGBest have pointed this out.
Description: Section 1256 contracts have lower 60/40 tax rates, with the 60% being a long-term capital gain even on day trades. Get 12% off your tax rates, and carry back 1256 contract losses against 1256 contract gains in the prior 3 years. Accounting and reporting for Section 1256 contracts is a snap. The problem is that many taxpayers and accountants overlook opportunities to use this tax-advantaged code section and that costs them real money.

Thursday, June 21, 2012, Time: 4:15 PM - 5:30 PM EDT
The Best Entities for Traders and Investment Management Businesses
Click here to download or stream (89 MB, time 1:41).
Click here for the description of this Webinar content on our blog.
Description: Traders should form entities to claim trader tax status (business breaks) with less IRS scrutiny, to unlock AGI-deductions (retirement plans and health insurance premiums), to elect Section 475 MTM (tax loss insurance) after April 15th, and to avoid the problematic Form 8949. Investment managers need entities for liability protection. Now, is an ideal time for traders to form a simple entity and the cost is between $500 and $1,000. Click here for our entity formation services.

Comments: We use a good power point presentation for this entire Webinar.
In the first 52 minutes, Robert Green CPA covers the best entities for traders.
At 52 minutes into the Webinar, Brent Gillett JD joins to co-present the rest of the Webinar on the best entities for investment management businesses.

Wed, Jun 13, 2012 1:30 PM - 3:00 PM EDT
FBAR deadline is June 29th: FBAR covered in-depth (Feldman JD).
Plus, short updates on Cost-Basis Reporting Crisis & Bush-era Tax Cuts (Green CPA)
Hot Topics and Recent Changes for Investment Management (Gillett JD)
Click here to download or stream (177 MB, time 1:48). *Sorry, our recording requires the GoToMeeting.com/codec plug-in beforehand for PC users (see note).*
Click here for recent FBAR blog and Webinar invitation showing full description.
Comments:

- For the first 18-minutes, Robert Green gives an overview of the topics to be covered.
- Then our Mark Feldman JD covers FBAR in-depth with an excellent power point presentation, giving many excellent tips on staying out of IRS trouble. This is a highly-nuanced area of tax law with many huge pitfalls. Click here for a consultation with Mr. Feldman with attorney-client privilege.
- At 1:06, Brent Gillett, JD gives updates on investment management, including some exciting news in the JOBS Act which may give hedge fund managers the ability to advertise, although it's not clear yet, so stay tuned.
- Brent gave an update on Dodd Frank Fin Reg changes for RIAs with the SEC and states. There is confusion on private-fund adviser exemptions, especially when they also have managed accounts.
- Brent discusses PAMM accounts and how some federal and state regulators may view some types of PAMM structures as simulated investment pools, which would require registration as pools. At 1:24, We touch on automated trading systems and if they can avail themselves of the publisher's exemption to avoid CTA or RIA registrations - it's not clear.
- After 1:30, we finish up with questions and some more on FBAR.
- Green spoke briefly on the promised topics of Bush-era tax cuts and cost-basis reporting crisis. As mentioned, see Green's June 6, 2012 MoneyShow videos from Traders Expo Dallas on these exact topics.

Tue, Apr 3, 2012 12:00 PM - 1:00 PM EDT
[NetPicks **Guest Interview] Talking Trader Taxes with Robert Green, CPA**
Click here to watch the recording.
In addition to the stated description, we will also address extensions and MTM elections due April 17, 2012. Including our content from our blog "Extensions: Some traders may qualify for IRS penalty relief."

Wednesday, March 28, 2012, 1:00 - 2:15 pm EST
Botched 1099-Bs, Form 8949 Differences, Tax Prep Tips, Extensions & MTM Elections
Panelists: CPAs Robert Green, Darren Neuschwander of Green NFH, LLC
Click here to download or stream (189 MB Windows Media Player wmv file). *Sorry, our recording requires the GoToMeeting.com/codec plug-in beforehand for PC users (see note).*
Click here for the invitation with Webinar description.
Comment: This is a must view Webinar for all securities traders, brokers and tax preparers. We hope the media and IRS watch it, too. See the smoking gun on botched 1099-Bs, broker-provided realized capital gain and loss reports, and problem Form 8949s. After seeing this Webinar, you will be convinced that you must file an extension and get more relief from brokers and the IRS. Please sign our Petition and share this Webinar and Petition with your broker and other traders. Also, watch the related Webinar done for TradeLog on March 27, below.

Tuesday, March 27, 2012, 1:00 - 2:00 pm EST
Tax Strategies and Solutions - Featuring CPAs Robert Green and Darren Neuschwander of GreenTraderTax!
Hosted by TradeLog
Click here to watch the recording on our "TradeLog for GreenTraderTax" landing page.

Tuesday, March 20, 2012, 1:00 - 2:15 pm EST
Learn How To Use TradeLog to Deal with Cost-Basis Reporting Problems on 2011 Tax Returns
Panelists: Robert Green, Darren Neuschwander and John Padgett of GreenTraderTax and Jason Derbyshire of TradeLog
Click here to download or stream (134 MB Windows Media Player wmv file).
Click here for the invitation with Webinar description.
Click here to read our blog series on cost-basis reporting that relates to this Webinar
Comment: This is a must view Webinar for all securities traders. Don't struggle with Form 8949 reconciliations without seeing this Webinar, first.

Thursday, March 8, 2012, 4:15 PM - 5:30 PM EST
What's New For Forex Traders On 2011 Tax Returns
Presenter & Host: CPAs Robert A. Green and Darren Neuschwander
Sponsor: FXCM
Click here to download (119 MB Windows Media Player wmv file). Video starts after 41 seconds.
See example 2011 tax returns for forex traders, and learn how to benefit from all the forex tax rules. Buy these examples in our Futures & Forex Examples Guide.
The recording will be for Premium Membership only, after March 15th.

Wednesday, March 7, 2012, 4:30PM EST
Trader Tax Law: Business Treatment, Elections, Entities, and Retirement Plans
What's New For Securities Traders On 2011 Tax Returns - Form 8949
Presenter: Robert A. Green, CPA
Sponsor and Host: Lightspeed Trading.
Click here to learn more and download the Webinar.

Thursday, Feb. 23, 2012 | 01:30 - 3:00 pm ET
Forex Tax Treatment and CFTC Forex Trading Rules for Americans
Hosts: CPA Robert A. Green and Attorneys Mark Feldman and Brent Gillett
FXCM invited their users
Click here for our recording (audio and video 175MB wmv file). *Our recording requires the GoToMeeting.com/codec plug-in beforehand for PC users (see note).*
Click here for the email invitation with description.

Thursday, Feb. 16, 2012 | 04:15 - 5:30 pm ET
Trader Tax Law Update: Business Treatment, Elections, Entities, and Retirement Plans
Host: CPAs Robert A. Green. FXCM invited their users.
Click here for our recording (audio and video 88MB wmv file).
You probably don't need our GoToMeeting.com/codec plug-in, and it should work for Mac and iPad users, too.
Click here for the email invitation with description.

> From: Wxx [mailto:xx@aol.com] Sent: Friday, February 17, 2012 6:03 PM
> To: webinar@greencompany.com. Subject: Congrats Great Webinar Yesterday
> Dear Sir or Madam, Just a short note to say "Great Webinar Yesterday". As both a trader/investor and a CPA, I thought the webinar was most informative and very well organized. Have a Nice Long Weekend.
> Regards, Bxx Myyy

Thursday, Feb. 9, 2012 | 01:00 - 2:30 pm ET
Trader Tax Tips & Investment Management Update
Hosts: CPAs Robert A. Green and Darren L. Neuschwander of Green NFH, LLC (CPA firm for GreenTraderTax.com) and attorney Brent Gillett of Investment Law Group
Attendees said "its our best Webinar lately."
Click here for our recording (audio and video 215MB wmv file). *Our recording requires the GoToMeeting.com/codec plug-in beforehand for PC users (see note).*
Click here for the email invitation with description.

Thursday, Feb. 2, 2012 | 04:30 - 05:45 pm ET
2011 Tax Returns: What's New For Traders To Deal With This Tax Season?
Hosts: Robert Green, CPA and New Partner Darren Neuschwander, CPA
Details: **Extensive coverage of new tax form 8949, for the new cost-basis reporting rules from the IRS, which are phased-in beginning in 2011**. There are many tax problems and challenges ahead for this tax season with Form 8949. Securities traders should not proceed without this recording and related blog. We covered a little about Form 8938 and foreign compliance, too.
Click here for our recording (audio and video). *While the audio starts immediately, the video starts around 2:15 into the Webinar. Our recording requires the GoToMeeting.com/codec plug-in beforehand for PC users (see note).*
Click here for the email invitation.

Prior Webinars by Category:

Trader Tax Benefits. Click here for several different Webinars and Series.

Forex Tax & Regulations. Click here.

Foreign Bank Accounts and Offshore Income. Click here.

Investment Management Business. Click here for a few and we have an exciting new series starting soon.

Trader Tax Benefits

Wednesday, Feb. 29, 2012 | 12:00 - 1:00 pm ET
Entities and Retirement Plans For Traders
Presenter: CPA Robert A. Green.
TradersLog.com hosted this Webinar. Sorry, they had some production glitches, so no recording. We are scheduling this Webinar again soon.
Description:
• Why business traders should consider an entity;
• The best types of entities for traders, and it varies by marital status and state;
• How to form and operate a trading entity;

- Why business traders should contribute to retirement plans;
- The best types of retirement plans for traders;
- When it's a good idea to consider a Roth IRA conversion;
- Borrowing money from a qualified retirement plan to fund your trading business;
- Avoiding early withdrawals, penalties, prohibited transactions and UBIT in retirement plans;
- How to limit and avoid self-employment (SE) taxes;
- When to pay yourself fees or salaries in an entity;
- How to handle startup costs, business expenses and UPE including home-office deductions;
- How retail trading entities compare with proprietary trading firms.

Thursday, Feb. 16, 2012 | 04:15 - 5:30 pm ET
Trader Tax Law Update: Business Treatment, Elections, Entities, and Retirement Plans
Host: CPAs Robert A. Green. FXCM invited their users.
Click here for our recording (audio and video 88MB wmv file).
You probably don't need our GoToMeeting.com/codec plug-in, and it should work for Mac and iPad users, too.
Click here for the email invitation with description.

Thursday, Feb. 9, 2012 | 01:00 - 2:30 pm ET
Trader Tax Tips & Investment Management Update
Hosts: CPAs Robert A. Green and Darren L. Neuschwander of Green NFH, LLC (CPA firm for GreenTraderTax.com) and attorney Brent Gillett of Investment Law Group
Attendees said "its our best Webinar lately."
Click here for our recording (audio and video 215MB wmv file). *Our recording requires the GoToMeeting.com/codec plug-in beforehand for PC users (see note).*
Click here for the email invitation with description.

Thursday, Feb. 2, 2012 | 04:30 - 05:45 pm ET
2011 Tax Returns: What's New For Traders To Deal With This Tax Season?
Hosts: Robert Green, CPA and New Partner Darren Neuschwander, CPA
Details: **Extensive coverage of new tax form 8949, for the new cost-basis reporting rules from the IRS, which are phased-in beginning in 2011**. There are many tax problems and challenges ahead for this tax season with Form 8949. Securities traders should not proceed without this recording and related blog. We covered a little about Form 8938 and foreign compliance, too.
Click here for our recording (audio and video). *While the audio starts immediately, the video starts around 2:15 into the Webinar. Our recording requires the GoToMeeting.com/codec plug-in beforehand for PC users (see note).*
Click here for the email invitation.

Thursday, Dec. 15, 2011 | 04:30 - 05:45 pm ET
Year-End Planning, Trader Tax, FTT, Tax Changes & Investment Management
Click here for our recording (audio and video). *Our recording requires the GoToMeeting.com/codec plug-in beforehand for PC users (see note).*

The Traders Expo - Las Vegas
Thursday, November 17, 2011 | 8:00 am – 9:00 am
TRADER TAX LAW UPDATE: BUSINESS TREATMENT, ELECTIONS, ENTITIES, AND RETIREMENT PLANS
Click here to watch the Webcast video of this live presentation.
For a power-point presentation of this same course material, see the TradersLog Webinar next.

TradersLog.com webinar presented by Robert Green
Wednesday, December 7, 2011 12:00 PM - 1:00 PM EST
Trader Tax Law Update: Business Treatment, Elections, Entities,
Retirement Plans, **Year-End Tax Planning & Current Developments**.
Click here for YouTube recording, or
Click here for our recording (audio and video of power point and more). *Our recording may require GoToMeeting.com/codec plug-in beforehand for PC users (see note). YouTube is better.*

DTI Interivew with Robert Green
Thursday, December 8, 2011 07:00 PM - 08:00 PM CT (or 8-9 ET)
Questions Traders are Afraid to Ask About Their Taxes
We hope to have an archive soon. It may rerun in DTI's room.

Sept. 8, Thursday @ 4:15pm ET
Trader Tax Benefits & Investment Management Business (Q&A)
Click here for our free recording (audio and video of power point and more).
Requires GoToMeeting.com/codec plug-in beforehand for PC users (see note).
Click here for the email invitation with description and new content.
We have lots of excellent Q&A on this Webinar and show you around our Websites.

Kick Off to Tax Season Webinar, a four-part series.
Part I - Trader Tax Benefits, Business vs. Investment Expenses & Tax Treatment
Part II - Qualifying for Trader Tax Status, Section 475 MTM and NOLs
Part III - Trader Tax Returns & Accounting
Part IV - Entities, Retirement Plans & More
**Completed Feb. 10, 2011.
See details below.
This six-hour Webinar has almost everything you need on trader tax this tax season. We highly recommend this recording set.

The Traders Expo - Las Vegas 2011
Robert A. Green CPA is presented both of the Traders Expo's tax sessions; the free Educational Workshop (1 hour) and the more in-depth paid session (4 hours). Click here to learn more.
Free Educational Presentation. Thursday, November 17, 2011 | 8:00 am – 9:00 am
TRADER TAX LAW UPDATE: BUSINESS TREATMENT, ELECTIONS, ENTITIES, AND RETIREMENT PLANS
Click here to watch the Webcast video of this live presentation.

TradersLog.com webinar presented by Robert Green
Wednesday, December 7, 2011 12:00 PM - 1:00 PM EST
Trader Tax Law Update: Business Treatment, Elections, Entities,
Retirement Plans & **Year-End Tax Planning**.
Click here for our free recording (audio and video of power point and more).
May require GoToMeeting.com/codec plug-in beforehand for PC users (see note).

Financial-Transaction Tax, Tax Breaks Under Threat, Inv. Mgmt, and Tax Changes
Aug. 25 @ 4:15pm ET
Click here for our free recording (audio and video of power point and more).
If trouble, requires GoToMeeting.com/codec plug-in beforehand for PC users (see note).
Click here for the email invitation with description and new content.

Trader Tax Returns, Entities & Retirement Plans
Thurs, June 9, 2011 @ 1:30 PM **Central Time**
DTI Trading Inc. hosted this event and our users are invited too.
Click here for our free recording (audio and video of power point and more).
***Requires** GoToMeeting.com/codec plug-in beforehand for PC users (see note).*

Trader Tax & Investment Management Update
Thurs., June 2, 2011 @ 4:00 - 5:30 PM EDT
Click here for our free recording (.wmv format).
***Requires** GoToMeeting.com/codec plug-in beforehand for PC users (see note).*
Mac and other users click here for our free audio recording in mp3 format.

Trader Tax Benefits, Qualifying, Business Expenses & Tax Treatment
Tue, Apr 5, 2011 @ 3:30 PM **Central Time**
DTI Trading Inc. is hosted this event and our users are invited too.

Trader Tax Returns, Entities & Retirement Plans
Thu, Mar 31, 2011 4:30 PM - 5:45 PM EDT
Click here for our free recording.

Lightspeed Trading invited its users to this event too.

Premium Membership

Trader Tax Benefits, Qualifying, Business Expenses & Tax Treatment
Tue, Mar 29, 2011 4:30 PM - 5:45 PM EDT
Click here for our free recording.
Lightspeed Trading invited its users to this event too.

Premium Membership

Trader Tax Returns, Entities & Retirement Plans
Date: Thursday, **March 24, 2011**
Click here for our free recording.
FXCM invited its users to this event too.

Premium Membership

Trader Tax Benefits, Qualifying, Business Expenses & Tax Treatment
Date: Tuesday, **March 15, 2011**
Click here for our free recording.
FXCM invited its users to this event too.

Premium Membership

Trader Tax & Investment Management General Webinar focused on Q&A
Feb. 24, 2011. Click here to learn more and for our free recording.
Includes: recent developments on federal and state attempts to attack trader tax status with hobby-loss rules, and how we are winning cases applying the "continuous business activity" argument; an **in depth look at the taxation of ETFs and options on ETF**s; tax preparation Q&A, valuable tips and more.

Forex Tax & Regulations

Premium Membership

Forex Tax Treatment and CFTC Forex Trading Rules for Americans
Thursday, Feb. 23, 2012 | 01:30 - 3:00 pm ET
Hosts: CPA Robert A. Green and Attorneys Mark Feldman and Brent Gillett
FXCM invited their users
Click here for our recording (audio and video 175MB wmv file). *Our recording requires the GoToMeeting.com/codec plug-in beforehand for PC users (see note).*
Click here for the email invitation with description.

Premium Membership

Forex tax & regulation update
Date: Thursday, March 10, 2011
Click here to learn more and for our free recording.
FXCM invited its users to this event too.
For background information, please see our blog's Forex Tax & Regulation section.

Premium Membership

Forex tax treatment
Date: Tuesday, March 1, 2011
Click here to learn more and for our free recording.
FXCM invited its users to this event too.

Foreign Bank Accounts and Offshore Income

Premium Membership

The end of this Webinar covers FBAR and the new form 8938 for reporting foreign assets. This Webinar relates to offshore forex accounts.
Thursday, Feb. 23, 2012 | 01:30 - 3:00 pm ET
Forex Tax Treatment and CFTC Forex Trading Rules for Americans
Hosts: CPA Robert A. Green and Attorneys Mark Feldman and Brent Gillett
FXCM invited their users
Click here for our recording (audio and video 175MB wmv file). *Our recording requires the GoToMeeting.com/codec plug-in beforehand for PC users (see note).*
Click here for the email invitation with description.

Premium Membership

Foreign Bank Account & Income Reporting (FBAR)
Thursday, June 30, 2011 1:00 PM - 2:00 PM EDT
Click here for our free recording (audio and video of power point and more).
Co-hosts Robert A. Green, CPA and Mark Feldman, JD
Contact Mr. Feldman at mfeldman@greencompany.com
Foreign Bank Account Reporting (FBAR). Click here for blogs.

Threats & Opportunities for Traders and Investment Managers

FREE DOWNLOAD

Oct. 27, Thursday @ 4:15pm
Traders Advocacy and Green's Entrepreneur Network
Click here for recording published on Traders Advocacy site.

FREE DOWNLOAD

Are traders under tax attack on futures rates, hobby loss rules, trader tax status and FTT?
Thu, Jul 14, 2011 1:00 PM - 2:30 PM EDT
Click here for our free recording (audio and video).
***Requires** GoToMeeting.com/codec plug-in beforehand for PC users (see note).*
Mac and other users click here for our free audio recording in mp3 format.
Click here for description and to share with others.
Click here for our July 12th blog article "Are lower 60/40 tax rates on futures in jeopardy?"

Investment Management Business

Premium Membership

Thursday, Feb. 9, 2012 | 01:00 - 2:30 pm ET
Trader Tax Tips & **Investment Management Update**
The later part is on Investment Management
Hosts: CPAs Robert A. Green and Darren L. Neuschwander of Green NFH, LLC (CPA firm for GreenTraderTax.com) and attorney Brent Gillett of Investment Law Group
Attendees said "its our best Webinar lately."
Click here for our recording (audio and video 215MB wmv file). *Our recording requires the GoToMeeting.com/codec plug-in beforehand for PC users (see note).*
Click here for the email invitation with description.

FREE DOWNLOAD

Launching an Incubator Hedge Fund: An Overview of the Process and Structure
Sept. 15, Thursday @ 4:15pm ET
Presented by Brent Gillett, JD of Investment Law Group.
Click here for our free recording (audio and video of power point and more).
May require GoToMeeting.com/codec plug-in beforehand for PC users (see note).
Click here for the email invitation with description and new content.
We have lots of excellent Q&A on this Webinar.

Premium Membership

Investment-management business set up
Feb. 15, 2011. Click here for details and the free recording.
This Webinar shows you how to set up an investment management business.

Premium Membership

Investment Management & Incubator Funds;
CFTC Forex Rules & Foreign Brokers and Banks;
IRS Foreign Bank Accounts & Offshore Income;
Financial-Transaction Tax Threat
Thu, Jul 7, 2011 1:00 PM - 2:30 PM EDT
Click here for our free recording (audio and video).
***Requires** GoToMeeting.com/codec plug-in beforehand for PC users (see note).*
Mac and other users click here for our free audio recording in mp3 format.
Click here for Webinar bulk email showing a full description.

Premium Membership

Trader Tax & Investment Management Update
Thurs., June 2, 2011 @ 4:00 - 5:30 PM EDT
Click here for our free recording (.wmv format).

***Requires** GoToMeeting.com/codec plug-in beforehand for PC users (see note).*
Mac and other users click here for our free audio recording in mp3 format.

Premium Membership

Trader Tax & Investment Management General Webinar focused on Q&A
Feb. 24, 2011.
Click here to learn more and for our free recording.
Includes: recent developments on federal and state attempts to attack trader tax status with hobby-loss rules, and how we are winning cases applying the "continuous business activity" argument; an **in depth look at the taxation of ETFs and options on ETF**s; tax preparation Q&A, valuable tips and more.

Technical note about recordings
Most recordings are available to PC, Mac and other users in fully converted Windows Media Player format. Occasionally, we experience a conversion glitch, which means the file will only work if you download/install the GoToMeeting codec plug-in beforehand. This will work for PC users only, so in these cases, we also offer an mp3 audio file for Mac users.

Webinars Being Planned Soon:

Investment Management Series:
Webinar: Maximize tax benefits in your investment-management business
Webinar: Accounting for investment management businesses
Webinar: Latest developments in tax legislation and regulation

Trader Tax Series
Webinar: TradeLog demonstration
Webinar: Trader tax return examples
Webinar: Entities
Webinar: Retirement plans
Webinar: Retail Trading versus Proprietary Trading, the Pros and Cons

Webinar Descriptions:

GreenTraderTax's Kick Off to 2011 Tax Season Webinar, a four-part series.
This is our most in-depth, best online Webinar series in years.
Thank you to Rockwell Trading for inviting its users too.

GreenTraderTax's Kick Off to 2011 Tax Season Webinar, a four-part series.

Over six hours of presentation and power point slides.
After purchase, immediate download of pdf file with the passwords

See our FREE previews: **Click here for a 6-minute clip of part 1** **Click here for a 5-minute clip of part 2** **Click here for a 6-minute clip of part 3** **Click here for a 7-minute clip of part 4**	**$39.95**	**Click here to purchase on our Guides page.**

***Available as part of our 2011 GreenTraderTax Guides & Webinars Platinum Package.**

Description:

It's time for traders and investment managers to become informed and organized for preparing 2010 income tax returns. Before you choose a CPA and send them your tax files or select a tax preparation program, learn these tips from trader-tax industry pro Robert A. Green, CPA.

In this online Webinar, learn the dos and don'ts of trader tax status, including how to qualify for business tax breaks (including in 2010); key tax-treatment differences between securities, futures, forex and more; tax elections and when to make them; using entities to unlock AGI deductions including retirement plans and health-insurance premiums; the best type of entities and retirement plans for traders; and how to handle pre-business education expenses while staying clear of others' false promises for education deductions using poor multi-entity schemes.

Get all the trader tax and investment-management business tax breaks you're entitled to for 2010. Set up your tax affairs for 2011. Be careful who you get your tax advice and services from and make sure the tax information you receive conforms to what we teach. For more information about problematic tax advisers and solutions, read our blog article.

Part I - Trader Tax Benefits, Business vs. Investment Expenses & Tax Treatment
Friday, January 14, 2011, 1:00 - 2:30 pm ET.

In Part I, we introduce this Webinar series and cover slides 1 through 19 of 49, including:

The dos and don'ts of trader tax status;

Business deductions (trader tax status) vs. investment expenses;

Key tax treatment differences between securities, futures, forex and more;

Tax elections and when to make them; and

How to handle pre-business education expenses, while staying clear of promoters' false promises for education deductions using poor multi-entity schemes.

Part II - Qualifying for Trader Tax Status, Section 475 MTM and NOLs
Friday, January 21, 2011, 1:00 - 2:30 pm ET.

In Part II, we started off with an interesting poll and shared the results.
Green began by summarizing Part I, and then delved into Part II, starting on power point slide 19 and ending on slide 28 of 49.
Part II includes the sections on:

Qualifying for trader tax status (covered in great depth);

Section 475 Mark-to-Market accounting (with all the nuances and strategies); and

Net operating losses (NOLs).

Part III - Trader Tax Returns & Accounting
Thursday, January 27, 2011, 1:00 - 2:30 pm ET.

In Part III, we start off with a different interesting poll and share the results.
Part III includes:

Don't get trapped with wasted forex losses;

Claiming trader tax status and preparing business trader tax returns;

Trading gains/losses are reported on different forms;

Problem and solution: Transfer of income strategy;

Trade accounting: A snap for futures & most forex traders;

Trade accounting is a responsibility for securities traders;

Trade accounting for securities is easier with TradeLog®

Part IV - Entities, Retirement Plans, Proprietary Trading Firms & More
Thursday, February 3, 2011, 1:00 - 2:30 pm ET. .

In Part IV, we start off with a different interesting poll and share the results.
Part IV includes:

Entities For traders;

Retirement plans for traders;

GreenTrader retirement plans;

Self-employment (SE) & payroll taxes;

SE tax:Exceptions for traders;

Proprietary trading firms;

Incubator funds;

Traders association; and

Other topics.

Investment-Management Business Series

Webinar: Investment-management business set up
Tue, Feb 15, 1:00 PM - 2:30 PM EST. Archive Recording below.
Windows Media Player video file. Suggest Windows Media Player 11.0 for streaming.
Power Point Slides.

If you are interested in forming an investment management business at some point in the future, this Webinar is right for you. Our incubator fund strategy is a great low-cost way to get started in investment management, click here to read our Feb. 10 blog. If you already have an investment management business, this Webinar is a good way to learn some of our special tax and regulatory strategies.

The biggest pitfall for new investment-management businesses is blowing tax elections. Learn how to handle all the tax matters correctly, including carried-interest tax breaks, the S-corp self-employment tax loophole, trader tax status and Section 475 MTM accounting, lower 60/40 Section 1256g forex tax treatment breaks, international tax planning including PFIC and QEF elections, mini-master feeders, good offshore fund destinations, tax and regulation changes and more. Click here to read our Feb. 8 blog on investment management tax strategies.

In this Webinar, you will learn how to start your own incubator fund and trade your own money with a performance record you can use later to attract investors into your own full-fledged hedge fund. Learn about licenses and the state and national regulations that apply to trading other people's money in securities, futures or forex.

See sample provisions of investment-management business documents including hedge fund documents (private placement memorandums, LP partnership and LLC operating agreements, and subscription materials) and managed account agreements.

Webinar: Forex tax treatment
Date: Tuesday, March 1, 2011, Time: 11:00 AM - 12:00 PM EST
Click here for free recording. Suggest Windows Media Player 11.0 for streaming.
FXCM invited their users to this event too.
For background information, please see our blog's Forex Tax & Regulation section.

Many people trade spot forex contracts and it's not clear if they can elect out of Section 988 (ordinary gain or loss treatment) with a capital gains election into lower 60/40 tax rates of Section 1256(g). Interbank (forex) forwards are clearly mentioned as being allowable in Section 1256(g), but spot is not mentioned and the IRS has been reluctant to expand the definition of contracts entitled to Section 1256 tax breaks.

If you have significant trading gains on spot forex contracts, those lower Section 1256 tax rates (such as foreign currency forwards) — which are up to 12 percent lower than the ordinary tax rates currently — may be very material and desirable to you, your forex fund and/or managed account investors. We've been working closely with the IRS tax attorneys who authored Section 988 (foreign currency transactions) and Section 1256(g) (foreign currency contracts), to iron out questions in these tax code sections as they apply to traders.

Forex transactions are reported in summary form. It's not clear in the tax code when you should use cash vs. MTM treatment. If using Section 1256(g), MTM treatment is required. We will discuss the fact that forex brokers generally don't report rollovers as realized transactions. Most forex brokers treat rollover interest as part of forex trading gains and losses and we make a case for how brokers are correct in not treating it as interest income.

Robert A. Green, CPA and our leading tax attorney Mark Feldman, JD will teach this Webinar. If you are forex trader or investment manager, or a professional practicing in this area, this Webinar will be valuable to you.

Webinar: Forex tax & regulation update
Click here for free recording. Suggest Windows Media Player 11.0 for streaming.
FXCM invited their users to this event too.
Date: Thursday, March 10, 2011
Time: 4:00 PM - 5:00 PM EST
For background information, please see our blog's Forex Tax & Regulation section.

Retail forex trading has grown significantly over the past decade. Forex traders benefited from loose regulatory oversight, allowing greater leverage than on-exchange currency futures. Nuances in tax rules allowed forex traders to "have their cake and eat it too" with ordinary-loss treatment in Section 988, and in some cases, lower Section 1256g 60/40 (futures) tax rates on trading gains.

New CFTC and NFA regulations in 2010 have reined in leverage and other more lenient policies for retail off-exchange forex trading conducted by Americans, whether they use U.S. or foreign-based brokerage firms or banks. Recent NFA enforcement actions and shareholder lawsuits against forex brokers have uncovered more details about forex brokers' utilization of trading software that taps into the interbank marketplace. As regulators and tax authorities learn more about these systems and practices, it may further influence tax and regulation policies. Stay ahead of the curve on these developments.

In our last Webinar covering forex tax treatment (recording available), we focused on spot forex, rollover transactions and other tax nuances in forex. In this Webinar, we will pick up where we left off and touch on the tax basics for forex and futures.

We will explain the new CFTC rules for off-exchange retail forex trading made effective on Oct. 21, 2010. U.S.-based forex brokers and international forex brokers catering to Americans must register with the NFA as registered foreign exchange dealers.

Even after the new rules are in effect, many Americans are still keeping their foreign brokerage accounts, even though their foreign broker isn't registered with the CFTC or NFA. Some foreign brokers claim to be banks and are allowed 270 more days to register with the CFTC by July 18, 2011. The new CFTC rules require foreign IBs, CTAs and CPOs to register with the NFA when they do business with Americans.

Robert A. Green, CPA will teach this Webinar. If you are forex trader, investment manager, forex introducing broker or brokerage firm, or a professional practicing in this area, this Webinar will be valuable to you.

Webinar: Maximize tax benefits in your investment-management business
Trader clients of GreenTraderTax understand that trader tax benefits play an important role in after tax returns. Hedge funds can also qualify for trader tax status. If they qualify, hedge-fund expenses including fees paid to the manager become a business deduction for investors. Without trader tax status, investors are stuck with restricted itemized deductions which are not deductible against AMT. Although hedge funds with trader tax status may elect Section 475 MTM accounting, many skip the MTM election because they don't want investors requesting redemptions to pay taxes on a Schedule K-1 pass-through of unrealized gains — which are realized with Section 475 MTM.

Hedge-fund managers also benefit from carried-interest tax breaks. Instead of charging performance-based advisory fees, otherwise known as incentive fees, they charge a profit-allocation of the investors' performance. If the underlying income includes long-term capital gains or futures (lower 60/40 tax rates), the manager enjoys that tax break too, rather than having ordinary income subject to SE tax.

Investment advisers to managed accounts have different tax rules. Their managed account investors can not use trader tax breaks because they engage an outside manager. The manager cannot have carried-interest tax breaks either, because they are not partners in a fund with special allocations.

Advisers to managed accounts and hedge funds should consider S-Corp. tax treatment to reduce self-employment taxes or payroll taxes. Advisory fees are earned income subject to ordinary tax rates plus SE taxes. Unlike with an LLC partnership return, an S-Corp does not pass-through this income as earned income to the owner manager. The IRS requires reasonable compensation to the owner/manager, which can be approximately 30 percent. The owner manager can save SE tax on the remaining fee income, which can be approximately 70 percent.

We will discuss lots of other important tax rules for investment managers of domestic and offshore hedge funds and retirement-plan investors including pension funds and endowments. We'll cover tax issues for master feeder structures and special issues for offshore funds, including Passive Foreign Investment Companies, QEF elections (for dealing with PFIC issues for taxable U.S. investors), and Unrelated Business Income Tax (UBIT) issues for U.S. tax-exempts.

Robert A. Green, CPA will teach this Webinar. If you're an investment manager or a professional practicing in this area, this Webinar will be of value to you. Meet our Brocha Lewenstein, CPA too; she heads up tax preparation for hedge funds in GreenTraderFunds. Ms. Lewenstein joined us from PWC, where she prepared hedge-fund tax returns for one of the leading investment banks on Wall Street.

Webinar: Accounting for investment management businesses
Learn how we do accounting for incubator funds, managed accounts and full-fledged hedge funds. Investor-level hedge-fund accounting is complex and consumer accounting programs like QuickBooks don't offer that type of accounting functionality. Hedge funds also require full general ledger accounting; specialized trade accounting programs like TradeLog for GreenTraderTax don't have that capability. It's best to use good investment-management business accounting software like FundCount. We'll give you a demonstration of FundCount software. We'll show you different accounting challenges and solutions between incubator funds and managed accounts. Meet our CPAs on this Webinar and see how we can help you.

Some bigger trader clients at GreenTraderTax are also interested in our full-service "institutional" accounting solutions and services. Rather than handle accounting piecemeal, some larger business traders prefer to consolidate their accounting into one program. FundCount handles the full general ledger, downloading transactions from banks and trades on securities, futures and forex from almost all online brokers. It handles tax treatment correctly on wash sales, Section 475 MTM and Section 988 or 1256(g) on forex. If you have a sizeable trading business, you deserve a more complete and consolidated accounting solution. It's better for impressing the IRS in an exam, and saves on fees too. It helps make the larger trader scalable into an investment-management business.

Robert A. Green, CPA and Christie Kam, CPA of GreenTraderFunds will teach this Webinar, joined by a FundCount representative. Ms. Kam heads up GreenTraderFunds accounting for investment management businesses. Ms. Kam was previously a senior auditor in the investment management group in PwC (big four CPA firm); she also did monthly and annual hedge-fund accounting for Goldman Sachs.

Webinar: Latest developments in tax legislation and regulation
The Dodd-Frank Financial Regulation legislation enacted on July 21, 2010 makes important changes to rules for investment managers. It beefs up SEC and state registrations for securities traders, includes forex under the CFTC/NFA regulatory umbrella, forces investment managers for all bigger securities funds to register with the SEC, raises the bar for accredited investors in hedge funds and increases regulations on derivatives calling for clearing on exchanges. The regulations are being drafted by the SEC and CFTC now, with a significant calendar of rules to be released throughout 2011.

The SEC is punting smaller hedge funds to states for regulation, making things very tricky for advisers and their attorneys. The SEC, state regulators and the NFA are also beefing up "sweeps" (audits) of egistered and unregistered advisers. Mock audits conducted by GreenTraderFunds may be a good idea.

The U.S. is acting in concert with the EU and others in the G-20 on financial reform. The EU continues to debate new passport rules for hedge fund managers. Will U.S.-based managers be disenfranchised? Not if Secretary Geithner can help it.

Offshore funds in tax-free jurisdictions like Cayman Islands and BVI are under attack from tax authorities and regulators in the U.S. and EU. New friendly jurisdictions for hedge funds are springing up in Luxembourg, Asia and elsewhere.

Robert A. Green, CPA will teach this Webinar. If you are an investment manager or a professional racticing in this area, this Webinar will be valuable to you.

Trader Tax Series

Webinar: TradeLog demonstration
See how easy it is to download trades from most online brokers and complete your annual trade tax accounting. There are different versions and functions for cash vs. Section 475 MTM accounting. See how to make Section 481a adjustments when you convert to Section 475 MTM accounting. Learn how to reconcile the results to annual 1099-Bs, review the program for wash sale reporting results and more.

Webinar: Trader tax return examples
We provide excerpts from our GreenTraderTax return examples guides, including examples for securities, futures and forex traders, and individuals vs. entities. Learn our special tax strategies, nuances, pitfalls and more. This Webinar is for tax preparers and self-preparers.

Darren Neuschwander, CPA, our top tax-return reviewer and Robert Green, CPA will teach this Webinar. We can review your tax returns too.

Webinar: Entities
Learn how we set up entities for traders. We show you how to chose between a husband and wife general partnership, multi or single-member LLC or S-corp election. Entities vary by state too. Learn how to avoid pitfalls, like trading in a C-corp.

Traders rarely have self-employment (SE) income, so it affects the choice of entity and tax planning inside the entity.

Conversely, investment managers generate earned income from advisory fees subject to SE taxes. That turns entity-structuring ideas upside down. Many investment managers are better off making an S-Corp election to reduce SE tax. But S-Corp elections are not a good idea in some cases, including when you need to make special allocations for working partners. S-Corps may only have one class of stock so special allocations are not allowed. Some states and cities tax S-Corps more too. Investment vehicles must allow for special allocations — to allow for carried interest tax breaks to the manager and more — so hedge funds are either Limited Partnerships (LPs) or LLCs, usually formed as virtual entities in Delaware. Management companies and trading companies should be formed in the home state of the manager or trader.

Robert A. Green, CPA will teach this Webinar.

Webinar: Retirement plans
Learn which retirement plans are best for traders and investment managers. Learn how we choose among retirement plan options, including when we suggest a "cookie cutter" retirement plan offered by leading online brokers, or when we suggest using an intermediary trust firm to set up and maintain your own self-directed retirement plan.

Mini 401k plans, otherwise known as individual 401k plans, are best for small-business traders and investment managers using S-Corp structures. With a Mini 401k plan, a trader or manager can maximize income tax savings vs. self-employment (SE) tax (or payroll tax) costs.

Learn the affiliated service group rules, which require coverage for affiliated company employees.

Learn the dos and don'ts of using retirement plans in your trading or investment-management business. IRS rules for prohibited transaction and self-dealing restrict your retirement plan from investing in the equity of your management company or trading business. It's possible to have your retirement plan invest into your hedge fund, provided it's not the anchor investor.

You can't borrow from your own IRA, but you can borrow from your own qualified plan, like a Mini 401k retirement plan. Learn how these loans work.

Learn to trade your retirement funds actively while deferring taxes until retirement. Learn to use Roth IRA conversions to soak up trader tax business losses, and when a Roth IRA may be right for you. Learn how to reimburse yourself for trading expenses from your retirement plans.

Robert A. Green, CPA will teach this Webinar.

Webinar: Retail Trading vs. Proprietary Trading

Retail trading generally refers to trading your own account. Retail day traders often qualify for trader tax status (business treatment) and securities traders usually elect Section 475 MTM ordinary gain or business loss treatment. Retail traders form entities to financially engineer AGI deductions including retirement plans and health-insurance premiums.

Proprietary trading refers to trading a proprietary trading firm's account. Proprietary trading firms engage proprietary traders as either employees (W-2), independent contractors (1099-Misc.) or LLC-member owners (Schedule K-1).

The main benefit of proprietary trading over retail trading is access to much higher leverage than retail traders get – such as 4:1 for pattern day traders in securities. Independent contractor proprietary traders report fee revenue, deduct business expenses, owe self-employment (SE) tax on the net and can contribute to retirement plans and deduct health-insurance premiums on this earned income. Conversely, LLC member proprietary traders don't have earned income reported on their Schedule K-1s, so they save SE tax and can't contribute to a retirement plan or deduct health-insurance premiums. We will cover various tax strategies for proprietary traders.

In the proprietary trading firm industry, there are hybrid models and special arrangements that cause confusion and can lead to trouble or opportunity. In this Webinar, we will review things you should consider in evaluating proprietary trading firm opportunities. These include making deposits and how to write them off when lost, which varies depending on your status. Also, learn how to handle hybrid models offering education first and proprietary trading rights later. Is it safe to join a proprietary trading firm that's not registered as a broker dealer – generally a "non-customer" broker dealer? Do you need a license to join a proprietary trading firm?

We will review regulatory developments and their significant impact on the proprietary trading industry. FINRA's notice to prop traders implies that many prop trading firms are out of compliance and may be reined in by regulators. Other firms are respecting this notice and are structured more appropriately. Dodd-Frank Financial Regulation enacted in July 2010 and still being codified by the regulators forces large commercial banks to exit the proprietary trading industry for their own account under the Volcker Rule.

We will also cover various alerts, industry blow ups like Tuco Trading LLC and international opportunities like engaging proprietary traders in emerging markets. At the end of this session, you can compare retail trading apples to proprietary trading firm oranges.

Robert A. Green, CPA will teach this Webinar. For background information, see our proprietary trading section on our Website.

If you have any questions about GreenTrader online seminars, or would like us to host an event for your company, kindly e-mail us at info@greencompany.com or call (877) 662-2014 (toll free), or (646) 216-8061.

