

OCCSEA Presents "Interest and Dividends- 1040 Schedule B"

From: OCCSEA (info.eaoc.org@f7iy7m.sqspmail.com)

To: ddabelstei@aol.com

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Interest and Dividends- 1040 Schedule B

**\$67 Member - \$77 Non-
Member**

Tuesday, June 17, 2025 5:30 PM - 7:30 PM

Santa Ana Elks Lodge

1751 South Lyon Street

Santa Ana, CA, 92705

Are you confident in your handling of interest and dividend income on the 1040? Join us for an in-depth session on Schedule B with Michael Tullio, EA. This course will walk you

through common scenarios, reporting pitfalls, and critical compliance points that can easily trigger IRS scrutiny if mishandled.

Learning Objectives:

- Know the filing requirements.
- Understand the importance of the placement of seller-finance on Schedule B.
- Review taxable & tax-free interest
- Explanation of qualified and non-qualified dividends
- A high-level overview of FBAR and FinCEN

Whether you're just starting or want a solid refresher, this **basic-level course** will strengthen your knowledge and boost your accuracy.

IRS: 2 hours Fed Tax Topics

CTEC: 2 hours Fed Tax Topics

CA Bar: 1.75 hours Taxation Law

3:30 PM - Board Meeting

4:30 PM - Social and Networking

5:00 PM - Dinner (Buffet TBA)

5:30 PM - Session Starts

7:30 PM - Session Ends



Registration: CSEA Link is open on the Learning Hub

[Register Now](#)

Mike is an Enrolled Agent and has been in the tax preparation business for over 40 years. He is the owner of Michael A. Tullio Financial Services, located on Mission Gorge Road in San Diego California. Mike up until recently was a Senior Tax Content Analyst at Intuit, makers of Turbo Tax, ProSeries and Lacerte. He is an Enrolled Agent.



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