

Robert A. Green, CPA/CEO

From: Robert A. Green, CPA/CEO [info@greencompany.com]
Sent: Wednesday, December 02, 2009 6:13 PM
To: rgreen@greencompany.com
Subject: New Videos & 12/03 Thurs.Call: Transaction Tax, Financial Reform, Trader Tax, Year-End, Entities, Retirement & Investment Management Business (Q&A)



Highlights Today:

Fidelity Investor's Publications 12/01/09 [Tax Tips for Traders](#) by Robert Green.
 Green's [Petition](#) to protect small-business traders from the financial-transaction tax.
[Green's videos from Vegas on Nov. 21](#): Traders and Roth IRA Conversion, Don't Penalize All Investors, Tax Tips for FX Traders, and Tax Code for Foreign Stocks and Futures.

12/03, Thursday Weekly Conference Call (Free):

4:15 - 5:30 pm ET, Dial 312-878-0224, Access Code: 603-682-315

[Podcast to be published following the call, and available with all prior podcasts.](#)

Year-end tax planning.

There is still time to do useful year-end tax planning for 2009. Read Green's article in today's issue of Fidelity Investor's Publication, "[Tax Tips for Traders](#)." Read Green's other year-end tax planning articles in *Active Trader* (Dec) and [our site](#).

[Our CPAs are standing by ready to help](#) you with year-end tax planning, including proforma 2009 tax returns as suggested in our articles. [Click here](#) to learn more and sign up (for a year-end deduction too). Or, just purchase a [consultation](#) with Green or your assigned CPA to discuss these strategies. December is a shorter month with the year-end holidays, so if you want our help before year-end, please tell us very soon.

A few important reminders.

- Federal Q4 estimated taxes are due Jan 15, but it's generally more favorable to pay the state Q4 vouchers by Dec. 31, for a year-end deduction (unless it triggers AMT).
- Mini 401k retirement plans must be established by year-end.
- Roth IRA conversions must be executed by year-end. Don't worry, you can recharacterize the conversion by Oct. 15, 2010.

Financial-transaction tax debate is escalating again.

[Kindly read and sign Green's Petition for Small-Business Traders](#) and please spread the word in chat rooms, social media and otherwise. Many important op-ed writers in the leading media are supporting a financial-transaction tax initiative which is empowering bill sponsors to seek support from Congressional leadership. Green responded to these op-ed writers on our blog. It's imperative that we all work together to put this fire out, before it spreads and burns down our businesses. **It's all hands on deck and we can win providing we all sign the Petition, send the letter to Congressmen, and add Comments to every media story.** This is one case where 'not putting your mouth where your money is' might really cost you. [Click here](#) to learn more about this tax and what we are doing and saying about it.

Special note on using a new entity set up in Q4 2009, or Q1 2010.

A year-end strategy with entities - using newtaxpayer MTM elections and AGI deductions like retirement plans - can only work if we form the entity and you open the entity trading accounts within the week. We can complete a partnership formation with in a day, but it may take up to a week with LLCs and S-Corps (state certificates take time). Otherwise, there is too little time left to make a new entity strategy work properly for year-end. In that case, it's wise to consider an entity formation for 2010, with a start date of Jan. 1. That's usually better than operating as a sole proprietor for part of 2010 and with an entity for the balance of the 2010. [Click here](#) to learn more and get started. With our outside attorneys, we can form your entity in mid-Dec. and have you ready to trade on Jan 1 in the entity account.

General Topics:

[Traders Association](#) ([please join](#) to fight the financial-transaction tax);
[Trader Tax](#), [Forex Tax](#) and Tax Treatment;
[Retirement Plan Strategies & Entities](#) for Traders;
Investment Management Businesses (current and proposed rules);
 News of the Week (tax and regulatory);
 Tax Changes Coming in 2010 and Beyond;
[Hedge Funds, Incubator Funds, and Registration issues](#);
[Proprietary Trading Firms](#);
 and [Green Energy Active Investors](#).

Hosts: Robert A. Green, CPA/CEO of GreenTraderTax and [Brent Gillett, JD of Investment Law Group of Gillett Mottern Walker, LLP](#).

Facebook and LinkedIn

Please connect with [Robert A. Green](#) and our [Traders Association](#) on facebook and on [LinkedIn](#) too.

Online and self-employed small business traders need their own trade association. We continue to fight off the potential financial-transaction tax and defend trader tax status (business treatment), Section 475 MTM, 60/40 tax rates, and more.

Dear Robert,

Please be our guest for the above and below listed events:

If you have any questions, please contact our customer support at **888-558-5257** (toll-free in US only), or **646-216-8061** (worldwide), or by email to info@greencompany.com.

Tax Preparation & Planning:

Preparation and planning of federal and state income tax returns for traders (retail, proprietary, and hedge funds [both individuals and entities]) is our core business. [Click here](#) to learn more about our tax preparation and planning services.

We are focusing on [year-end tax planning](#) for 2009 now.

We always help clients with late or amended prior year tax return filings too. Better late than never.

Consultations:

After you read, view and listen to our leading content about trader tax, forex tax, tax changes, entities and retirement plans for traders, hedge funds/advisers, and proprietary trading firms, you will probably have some good questions for our Robert A. Green, CPA.

[Click here](#) to learn more or purchase and schedule an immediate consultation.

[Trade Accounting Software & Services](#)

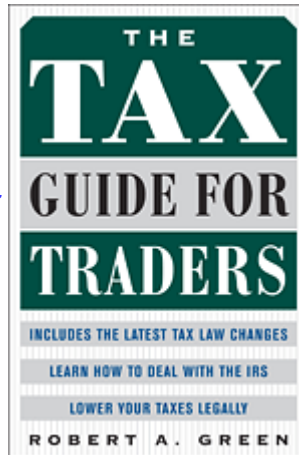
[GreenTraderTax Guides:](#)

The Tax Guide for Traders (McGraw Hill 2004 hardcover & pdf). Comes with free updates in our login area.

Free Upgrade: All purchases of our examples guides after Oct. 15, 2009 come with a free upgrade to our 2010 guides.

2009 GTT Guides: 2008 Tax Return Examples for Securities Traders and a separate examples guide for Commodities, Futures & Forex/Currency Traders (online). We also have an Accounting Guide.

Our trader tax guides have been best sellers every year since 1997. See our excellent reviews and get the help you need today.



[Tax Center:](#)

See our articles on trader tax, MTM, entities, retirement plans, tax treatment, securities versus futures, forex, precious metals versus base metals, global tax, non-resident alien traders, IRS exams, and much more.

[Blog:](#)

Robert Green writes about many hot topics for traders including tax law changes, trader tax, proprietary trading, real estate losses, and more.

Recent articles:

- Dec 01 09 - Response to op-ed articles supporting the financial-transaction tax
- Nov 25 09 - Financial-transaction tax: Not dead globally
- Nov 24 09 - Save traders' jobs: Do not enact a financial-transaction tax
- Nov 20 09 - Financial-transaction tax update 2: Global consensus needed
- Nov 19 09 - Financial-transaction tax update 1 (11/19)
- Nov 18 09 - More thoughts on the financial-transaction tax (Nov. 17, 2008)
- Nov 09 09 - Financial-transaction tax is dead on arrival globally, which is good news locally
- Oct 21 09 - Financial-transaction tax remains a hot button issue
- Oct 02 09 - State tax update: CA, NYS and other states

Our trade accounting software (and our accountants too if you need help in that area) can handle your trade accounting needs.

[TradeLog® for GreenTraderTax.](#)

Learn more how TradeLog is much better than any other program for active traders.

[Webinars, Radio & Trade Shows:](#)

Most are archived so you can take these Webinars anytime you like.

Plus, due to popular demand, several more Webinars with Green are coming soon from most of these companies.

- NYC & Vegas Traders Expo Classes
- MoneyShow.com (many educational videos, Webcasts and interviews with Green)
- FXCM & DailyFX.com
- CBOT
- optionsXpress
- Lightspeed
- DTI
- Vince Rowe Radio Show
- NYS Society of CPAs
- Rockwell Trading
- TraderInterviews.com

Green In The Media Recently:

Fidelity: 12/01/09 [Tax Tips for Traders](#), 3/24/09 [Tax Questions and Answers](#) with Robert Green; and 2/17/09 article from Green, [IRS Strategy for Active Trader](#);

are planning tax increases
 Sep 25 09 - Year-end tax planning, part 2
 Sep 23 09 - Year-end tax planning, part 1
 Sep 03 09 - AFL-CIO lends support to a dreaded financial-transaction tax
 Aug 06 09 - Traders Association
 Jul 31 09 - Offshore account IRS voluntary disclosure program deadline is 09/23/09
 Jul 15 09 - Retirement-plan strategies - Important May 29 09 - GreenTrader self administered and self-directed retirement-plan strategies and services
 May 14 09 - 2010 Obama Budget Tax Proposals: Some Clarifications
 May 12 09 - New potential attack on 60/40 treatment for dealers
 May 01 09 - Trader tax status review
 Apr 30 09 - Recent IRS techniques against traders
 Apr 29 09 - Recession ushers in new traders
 Apr 28 09 - Trader tax & carried interest updates
 Mar 05 09 - SEC raising fees
 Mar 04 09 - Rep. Peter DeFazio defends financial-transaction tax on CNBC
 Feb 27 09 - Did Chairman Frank say the financial-transaction tax is on hold pending Wall Street payback of TARP funds?
 Feb 19 09 - Financial-transaction Tax Reintroduced in House as H.R. 1068
 Feb 18 09 - Forex and Tax Treatment
 Jan 16 09 - Foreign futures exchange given 60/40 treatment
 Jan 14 09 - Potential Financial-Transaction Tax of 0.25% on proceeds and purchases

Tools:

We are also pleased to offer our users and customers this tools section, including general tax, financial and business resources. This tools section is the only area of our Web site that is powered by a third-party company, and they do an excellent job.

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