Using Business Tax Returns to Analyze Lending Requests

Description: This session will demystify the information contained in tax returns. Those who attend will be able to distinguish between what to pay attention to in tax returns and what to ignore in them. The result of attending this session will be a better understanding of the information contained in tax returns to be used for business credit analysis purposes.

Objectives of the Presentation:

- To use tax returns for credit analysis purposes
- To be able to answer profit and loss statement questions from tax returns
- To be able to answer balance sheet questions from tax returns
- To understand how financial statements are different from tax returns
- To understand various tax forms
- To know what questions to ask for additional information from potential clients

Why Should you Attend:

The only reliable financial information available from many businesses, especially small businesses, is contained in tax returns. When accountant-prepared financial statements are not available from businesses, lenders and credit analysts will often need to make a lending decision based on the information contained in those tax returns. This program will educate attendees in the ways in which business tax returns are both similar to and differ from conventional financial statements.

Who can Benefit:

- Credit Analysts
- Loan Officers
- Branch Managers
- Loan Committee members
- Other personnel with a basic understanding of business credit analysis

Contents: Areas Covered:

- Relevant tax return schedules and forms for various types of businesses
- Identifying the cash inflows and outflows of businesses from tax returns
- Essential questions to ask when using the tax returns of businesses
- M-1 and M-2 Schedules
- Depreciation and what it means
- Amortization of Intangible Assets
- The Schedule L and what it says about a business


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