

Link to video: <https://youtu.be/1htFg5Nfa5Y>

Link to handout: <https://www.aaii.com/files/images/2020-12-09-AAII2020TaxGuidePreview.pdf>

AAII Articles

Just released:

[The Individual Investor's Guide to Personal Tax Planning 2020](#)
[Guide to Tax on Your Personal Investments 2020](#)

Tax Rule Changes:

[Tax Guide Update: Staying Current on the New Rules](#)
[The Top SECURE Act Provisions Individual Investors Should Be Aware Of](#)
[Inherited IRA Rules Before and After the SECURE Act](#)

IRAs and Roth IRAs:

[Strategies for Managing Required Minimum Distributions](#)
[Roth Versus Traditional IRA Decision Tree](#)
[Roth IRA Conversion Spreadsheet](#)
[State Law May Protect Inherited IRA Assets From Creditors](#)
[Supreme Court: No Bankruptcy Protection for Inherited IRAs](#) (2014)
[New Rules for IRA Rollovers](#) (2014)
[Be Aware of IRA Rollover Rules](#) (2014)

Online Tax Services:

[The Most Popular Tax Preparation Services Used by AAI Members](#)

Charitable Trusts:

[The Advantages of Charitable Trusts](#)

Charles' Investor Update Columns

[What to Do With the Stimulus Check](#)
[The CARES Act and Tax Rule Changes](#)
[Considerations for Roth IRA Contributions and Conversions](#)
[Choosing Between a Traditional and a Roth IRA](#)

[Charles' Twitter](#)

Other Resources, Articles Mentioned

Tax Resources That Charles Uses

[IRS.gov](#)
[Wolters Kluwer](#)
[J.K. Lasser's Your Income Tax](#)
[The Kiplinger Tax Letter](#)
[My Tax News Twitter List](#)
[TurboTax](#)
[AAII Tax Guide](#)
[CapGains Valet](#)
[IRS Coronavirus Tax Relief and Economic Payments](#)

[IRS Frequently Asked Questions on Virtual Currency Transactions](#)

[IRS Notice 2014-21 on Bitcoin](#)

[IRS Topic No. 419 Gambling Income and Losses](#)

January 2014 blog post by Michael Kitces:

[Understanding The Two 5-Year Rules For Roth IRA Contributions And Conversions](#)