First Day of Class Assignment

TAX PLANNING
Spring 2023
Professor Lauren Shores Pelikan

Course Materials

There is no assigned textbook for this class. There will be assigned readings from various electronic resources including Bloomberg BNA Tax Practice, Tax Notes, Thompson Reuters Checkpoint, and Practicing Law Institute (PLI). You will also need to be able to access the Internal Revenue Code and the Treasury Regulations. You may use a code book from a prior tax class (such as Lathrope, Selected Federal Taxation Statutes and Regulations (2023 Edition)) or access the code and regulations electronically through one of the previously listed electronic resources.

Syllabus

The class syllabus will be posted on Canvas.

Assignment for Wednesday January 18

Read the following article from Tax Notes:

- The Reliability of Tax Writings (taxnotes.com) by Jasper Cummings

Make sure that you can access the following electronic resources (specific instructions will be posted on Canvas):

- Bloomberg BNA Tax Practice
- Tax Notes
- Thompson Reuters Checkpoint
- PLI (you should have received or will be receiving an email from PLI; if not, visit https://plus.pli.edu and log in with your Mizzou email. If this is your first-time logging in, click “Forgot Password?” and follow the prompts to set your password.)

If you are not familiar with these electronic resources, I recommend spending some time looking through these resources, especially the first three (BNA, Tax Notes, and Checkpoint). Several of these resources have self-guided or pre-recorded trainings on how to use the research platform. See the following pages for how to access these trainings on Checkpoint and Tax Notes:
For Checkpoint, you can click on “Onboarding” as shown below to access some training material.
For Tax Notes, click on “Help Center” and you can then find training materials for both Tax Notes (this is mostly the news articles) and Tax Notes Research (the research function).

Step 1: Click on “Help Center”

Step 2: Click on “TaxNotes.com”
Or, click on “Tax Notes Research”