

First Day of Class Assignment

TAX PLANNING

Spring 2024

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 (2024 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 Tuesday January 16

Read the following article from Tax Notes:

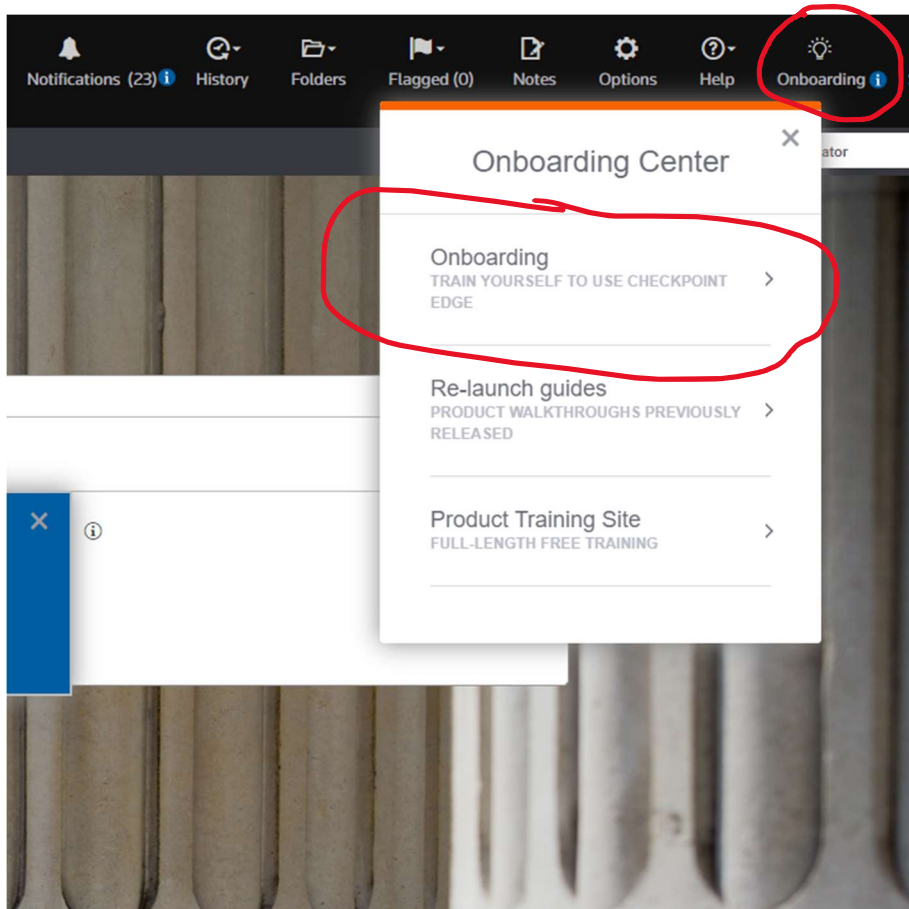
- [The Reliability of Tax Writings \(taxnotes.com\)](#) by Jasper Cummings

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 (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.)

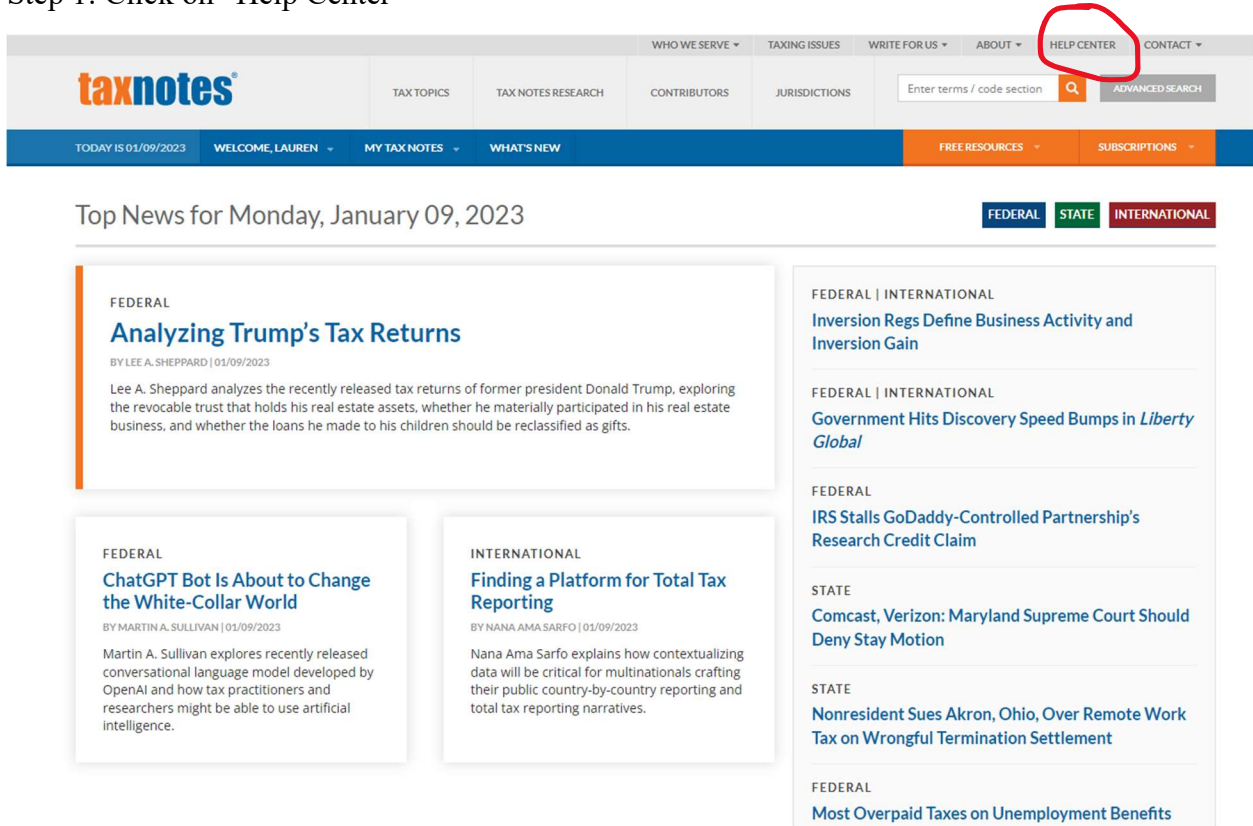
If you are not familiar with these electronic resources, I recommend spending some time looking through these resources, especially the first three (BNA, Tax Notes, and Checkpoint). Several of these resources have self-guided or pre-recorded trainings on how to use the research platform. See the following 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 news articles) and Tax Notes Research (the research function).

Step 1: Click on “Help Center”



The screenshot shows the TaxNotes.com website header. The navigation menu includes: WHO WE SERVE, TAXING ISSUES, WRITE FOR US, ABOUT, **HELP CENTER** (circled in red), and CONTACT. Below the navigation is a search bar with the text "Enter terms / code section" and a search icon. The main content area displays "Top News for Monday, January 09, 2023" with filters for FEDERAL, STATE, and INTERNATIONAL. Several news articles are listed, including "Analyzing Trump's Tax Returns" and "ChatGPT Bot Is About to Change the White-Collar World".

Step 2: Click on “TaxNotes.com”

Help Center

Welcome to the TaxNotes.com Help Center. Here you can find information on our website via downloadable user guides and instructional legal research assistance, please contact research.help@taxanalysts.org.

Topics



- TaxNotes.com** ▶
 - TaxNotes.com Quick Reference Guide
 - Advanced Search Quick Reference Card
 - Tax Notes Research ▶
 - Email Delivery ▶
 - Audit Insight ▶
 - Nexus Tracker ▶
 - Worldwide Tax Treaties ▶
 - Coverage ▶
- Getting Started With Tax Notes:
- Tax Notes Overview Video
 - Accessing Our Publications & Personalizing Your Email Subscriptions
 - Navigating & Searching Taxnotes.com

Or, click on “Tax Notes Research”

Help Center

Welcome to the TaxNotes.com Help Center. Here you can find information on our website via download at additional legal research assistance, please contact research.help@taxanalysts.org.

Topics

- TaxNotes.com ▶
 - Tax Notes Research** ▶
 - Email Delivery ▶
 - Audit Insight ▶
 - Nexus Tracker ▶
 - Worldwide Tax Treaties ▶
 - Coverage ▶
-  [Tax Notes Research Features](#)
 -  [Tax Notes Research Video](#)

—