

2018 ACP Tax-Focused Case Study Competition Announcement

The Alliance of Comprehensive Planners (ACP) announces its Second Annual Tax-Focused Case Study Competition. This competition is designed exclusively for undergraduate degree programs registered with the CFP board. In this challenge, each competing student will review the hypothetical scenario provided including relevant background information, financial data, and a hand-written tax organizer and then execute the tasks stated at the end of the case study packet. It is important to note that any IRS materials used should be from the 2017 tax year.

2018 ACP Tax-Focused Case Study Competition Timeline

Announcement: **June 22**

Submission Date: **September 16**

- **NOTE: Completed case studies should be sent to marykate@acplanners.org by 11:59 p.m. on September 16.**

Submission Review: **September 17 - October 7**

Submission Announcement: **October 8**

Conference: **November 6-9**

2018 Competition Materials

<https://community.acplanners.org/viewdocument/competition-materials>

Eligibility

- One student per submission, but no limit on the number of students competing from any particular CFP Board-registered program.
- All participating students must be enrolled in an undergraduate degree program registered with CFP Board as of the first day of their program's Fall 2018 semester.
- Students considered graduate students at their school may not participate.
- Students are prohibited from seeking advice from professionals or from persons not participating in the competition.

- The use of industry-specific professional software is prohibited. This includes but is not limited to tax-preparation software and financial planning software.

Awards

The winner of this competition will receive:

- One free registration to attend the ACP 2018 Annual Conference in Miami, Florida
 - Roundtrip coach airfare up to \$500
 - Three nights hotel accommodations (November 6 -9) for one at the 2018 Annual Conference hotel (Miami Marriott Biscayne Bay Hotel)
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