# TAX PLANNING & STRATEGIES THROUGH VALUATION

Join us via Zoom for a powerful webinar covering strategies to minimize taxes, preserve wealth, and safeguard your business. Topics include maximizing gifting strategies, preparing for TCJA sunset changes, leveraging trusts, optimizing real estate ownership, buy-sell agreements, tax implications of goodwill, and case studies on common challenges. Don't miss this opportunity to secure your financial future and drive growth.

## TOPIC HIGHLIGHTS:

- Maximizing Gifting Strategies to Minimize Current Taxes and Estate Liabilities
- Preparing for Changes Under the TCJA Sunset Provisions: Key Recommendations
- Leveraging Valuations and Trusts to Maximize Cash Flow and Preserve Wealth
- Structuring Real Estate Ownership to Maximize Value and Minimize Taxes
- How Buy-Sell Agreements and Insurance Safeguard Your Business
- The Tax Implications of Personal vs. Corporate Goodwill in Transactions
- Case Studies – Common Challenges we Encounter

**April 23, 2025**

1:00 PM - 2:00 PM MST

Zoom Webinar

## OUR SPEAKERS

**ASHLEY EDWARDS, CVA**

**AARON ABENDROTH, CPA**

**ESLLIEY TAN, CPA, CVA**

**SCAN HERE FOR MORE DETAILS!**