



## 2024 SUMMER EDUCATION SERIES

### **MAY 23, 2024 | 11am - 12pm PST** **Effective Tax Research for Tax Strategy Preparation**

*Dominique Molina, CPA, CTS, MST*

Designing tax plans can be tricky – especially when trying to line up your clients’ unique (and sometimes wacky) circumstances with the black and white of the law. This session is all about learning how to interpret and document your research findings. We’ll cover the hierarchy of authoritative guidance, which interpretations can be relied upon, and how to protect your recommendations (and your client) during an examination.

### **JUNE 6, 2024 | 11am - 12pm PST** **Closing the Gap: Mastering the Sales Process for Accountants & CPAs**

*Marie Torossian, CPA*

Join this highly anticipated session featuring strategies by the internationally renowned sales expert Grant Cardone, facilitated by Marie Torossian, a 10X Certified Elite Coach. Gain invaluable insights, practical strategies, and insider tips to increase your closing rate, save time, and achieve sustainable growth for your firm. Take this opportunity to elevate your sales skills and unlock your potential for success in the accounting industry.

### **JULY 11, 2024 | 11am - 1pm PST** **Tips for Working With the Internal Revenue Code with Confidence**

*Annette Nellen, CPA, CGMA, Esq.*

It is not always easy to read, interpret and apply Internal Revenue Code provisions with confidence. This webinar goes over several tips for reading the IRC effectively with examples. So, let’s get into the IRC’s general rules, exceptions, special rules, definitions, subchapters, parts and subparts, and effective dates and leave with easy to apply tips for effectively dealing with a complex IRC.

### **AUGUST 8, 2024 | 11am - 12pm PST** **Purchase and Sale of a Corporate Business**

*Lucien P. Gauthier, Esq., LL.M., CPA*

A thorough review of many of the complex issues that can arise with the sale of a corporate business, including disposition of assets and stocks, tax consequences, bonus depreciation, section 179 expensing, gains and losses, allocations, section 197 on amortization of intangibles, reporting requirements and a discussion of several cases such as Norwalk, Frontier Chevrolet, Bemidji, Muskat, and Recovery Group.



We are offering a **FREE CONTINUING EDUCATION CREDIT\*** to all qualifying participants courtesy of our friends at the *American Institute of Certified Tax Planners!*