



THINK OUTSIDE
THE TAX BOX

TOTTB's Summer Series!

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2025 EXCELLENCE IN TAX EDUCATION

JUNE 26, 2025 | 11am - 12pm PST

Tips for Staying Relevant and Navigating a Reduced IRS

Annette Nellen, CPA, CGMA, Esq., Professor & Director of San Jose State MST Graduate Program

We're in the 4th Industrial Revolution and digital era where the rapid speed of change is the key constant. How can we keep up with an onslaught of news and social media sources of information (and identify and deal with misinformation), keep up with changes in technology and business practices, as well as tax law and tax practice changes (*particularly in light of significant reductions in IRS resources in 2025*)?

JULY 15, 2025 | 1pm - 2pm PST

Cooking Up Tax Strategies: What Breaking Bad Teaches Us About Taxes

Dominique Molina, CPA, CTS, MST, CEO of AICTP*

"You know the business. I know the tax law."

We'll dive into the real-world tax strategies hidden within **Breaking Bad**, revealing the fine line between tax avoidance and tax evasion. Using iconic clips from the show, you'll discover how to legally reduce taxes, protect assets, and structure businesses the right way—without ending up on the IRS's most wanted list.

- How to legally minimize taxes using entity structuring (*without needing a car wash front*)
- The secrets of asset protection and estate planning (*that Skyler should have used*)
- How money laundering works (*and why you should never take tax advice from Saul Goodman!*)
- Business exit strategies that won't leave you with barrels of cash you can't spend.

AUGUST 19, 2025 | 11am - 1pm PST**

Tax Treatment of RE Professionals for Purposes of Sections 469, 1411, & 199A

Lucien P. Gauthier, Esq., LL.M., CPA **2 Hour Course

Join the President of the Boston Tax Institute as he explores topics including analysis of Section 469(c)(7), Reg. 1.469-9, and cases involving the two requirements which must be met in order to qualify as a real estate professional; a discussion of the election under Reg. 1.469-9(g) to aggregate rental real estate activities and Rev. Proc. 2011-34 that allows this election to be made on an amended return for a prior taxable year and its effect on PAL carryovers and subsequent dispositions of property; the consequences of REP status for purposes of Section 1411 and Reg. 1.1411-4(g)(7); the interrelationship with Section 199A; and so much more.

AUGUST 28, 2025 | 11am - 12pm PST

Using Real Estate Investments to Provide Tax-Advantaged Solutions

Gary Moses, President and CEO of Vistia Capital

We'll provide you with practical tools and insights to help you guide your clients through effective tax planning. Learn how real estate can serve as a strategic asset—not just for building wealth, but for reducing tax burdens and creating long-term financial flexibility.

- How to use fee simple land donations and other real estate strategies for tax deductions
- Charitable contributions of real property for estate planning and tax reduction
- Structuring real estate investments for maximum tax efficiency
- Recent Headlines and Industry updates



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