

TOTTB's Summer Series!
STARTS JUNE 11th!
THINK OUTSIDE THE TAX BOX
Zoom links will be sent to your email.
SUMMER SERIES SPONSORED BY: **sandy bay PARTNERS**
DON'T MISS!
DOMINIQUE MOLINA
ANNETTE NELLEN
LUCIEN GAUTHIER

2026 EXCELLENCE IN TAX EDUCATION

JUNE 11, 2026 | 11am - 1pm PST

1040 Diagnostic Training: How to Read a Tax Return Like a Tax Planner

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

Most tax professionals look at a Form 1040 and see completed forms. Strategic tax planners see something very different. In this hands-on training, you'll learn how to "read the labs" of a tax return using a diagnostic approach designed to uncover hidden tax savings opportunities line-by-line through the Form 1040. You'll learn how experienced planners interpret the return itself to identify where additional deductions, income shifting opportunities, entity planning, credits, timing strategies, and structural tax savings may exist.

This course is ideal for tax professionals who want to move beyond compliance and begin thinking like true advisors.

JULY 9, 2026 | 11am - 1pm PST

Federal Tax Cases to Know to Show Your Tax Chops

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

Over many decades of tax cases, a body of judicial doctrines have been created and frequently used. Generally, these are not part of the Internal Revenue Code, but must still be considered because a tax provision might not apply if a judicial doctrine, such as substance over form or the step transaction doctrine, interprets the facts in a different light. This webinar identifies and explains key judicial doctrines and rules with examples, to further support and expand our "tax chops" for compliance and planning purposes.

AUGUST 13, 2026 | 11am - 2pm PST**

Grouping for Purposes of Sections 469, 1411, & 199A

A Solution in Search of a Problem

*Lucien P. Gauthier, Esq., President of the Boston Tax Institute **3 Hour Course*

The proper grouping of activities can be extremely important for purposes of sections 469, 1411 (the 3.8 tax on NII), and 199A. Topics include a comprehensive analysis of the rules for grouping that are contained in section 469, Reg. 1.469-4, and the judicial decisions and administrative pronouncements involving grouping; the difference between grouping under Reg. 1.469-4 and aggregation under Reg. 1.469-9, and a special chart depicting these differences; the differences between grouping and aggregation for purposes of Section 199A; the use of Form 8275 to disclose issues involving uncertain tax positions regarding grouping; and so much more!

SEPTEMBER 10, 2026 | 11am - 12pm PST

Transforming Land Into Legacy Impact of Charitable Land Donations

Nick Dolya, Executive Vice President, Sandy Bay

In today's evolving philanthropic landscape, understanding charitable land donations is more crucial than ever. As communities increasingly seek sustainable solutions, land donations offer a unique opportunity to create a lasting impact while also addressing environmental and social challenges. By attending this webinar, you'll gain valuable insights into the latest legal updates and new offerings that can enhance your charitable efforts and ensure compliance in a complex regulatory environment.



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