

Tax Seminar Topics

Income Taxes – The Topic That Can Either Put You to Sleep or Keep You Up All Night. We'll review the various types of income and why some types are better than others. We'll discuss interest income, dividend income, capital gains income and ordinary income.

You Didn't Think Saving Money in an IRA Would Be This Complicated, Did You? We'll discuss the tax affects of withdrawals, early penalty withdrawals, required minimum distributions, converting from an IRA to a ROTH account, and different strategies you can employ to avoid early withdrawal penalties. Included in this discussion will be techniques for creating legacies.

Time to Send the Kids to College - Educational Planning Strategies. In this seminar, we'll outline the various educational savings vehicles including Coverdell IRAs, ROTH IRAs and 529 plans. We'll discuss the pros and cons of each and what considerations need to be made in plotting a path to pay for education.

Home Sweet Home... or is it? Primary, Vacation, Rental Home Tax Issues - We'll talk about the various tax implications when you acquire, hold and dispose of real estate.

You've Spent a Lifetime Accumulating, Now How Do You Minimize Taxes in Retirement? The time has come to migrate from a growth to a harvesting strategy. We'll discuss the various methodologies, long-term historic returns, how to create a balanced portfolio and the tax implications of each option.