

# DAY 1

8:30 Registration

9:00 Welcome

## SECTIONS:

1. Why Small Business
2. Unleashing the “Trifecta”
3. Capturing Start-up Costs
4. The Power of Board Meetings
5. Entities & the S-Corporation
6. Rental Properties and LLCs

12:00 LUNCH BREAK

7. Estate Planning Basics
8. Dining and Food Expenses for 2023
9. Auto Deduction Strategies
10. Changing State Domicile
11. Maximizing Travel Write-Offs
12. Paying Family Members

5:00 End

# DAY 2

9:00 Welcome

## SECTIONS:

1. Saving Strategies
2. Choosing the Best Retirement Plan
3. Everything Roth IRAs
4. Why Rental Real Estate
5. Passive, Active & Real Estate Professional Status
6. Short-Term Rentals

12:00 LUNCH BREAK

7. Active Trader Status
8. Charitable Remainder Trusts
9. Deducting Medical Expenses
10. Health Savings Accounts (HSAs)
11. Health Reimbursement Arrangements (HRAs)
12. Self-Directing Basic