



Advanced Tax Strategies & Captive Insurance 831(b) from a CPA Perspective

Course Details

Target Audience: CPAs

Delivery Method & Duration:

Instructor-Led/Group-Live; 3 Hour

CPE Credit & Primary Field of Study:

3 CPE Hours; Taxes

Prerequisites & Preparation: None

Program Level: Basic

Course Instructor: Ken Huffman, CPA

Course Fee when applicable:

TBD

Registration Information:

Advanced registration is required

Refunds, Cancellations & More:

For registration, attendance requirements, policies on refunds, cancellations, or concerns, contact the organizer of this workshop.

TEXAS STATE BOARD OF PUBLIC ACCOUNTANCY

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NOTE: In some instances, CPE hours may be awarded by the organizer of this workshop.

Program Description & Learning Objectives

This instructor-led/group-live method of delivery course presented by a CPA will present to CPAs, Attorneys, Business Owners, Financial Advisors, and Family Offices, along with M&A and Insurance professionals on business tax strategies and captive insurance 831(b) from a CPA perspective.

ADVANCED TAX STRATEGIES

The pros/cons and legitimacy or illegitimacy of the following: Capital Gains Strategies; Tax Free Income-Myth or Fact?; Cost Segregation; Opportunity Zones; R&D Tax Credits; Business Exit Strategies and more

Participants who successfully complete this course will be able to:

- Identify and explain tax strategies from multiple industries including financial, insurance, legal industries and estate planning;
- How to analyze which clients could benefit from the tax strategies;
- The advantage and disadvantages of certain tax strategies;
- Understand the financial and tax impact of implementing certain tax strategies;
- Understand how certain industries operate and how tax strategies are often promoted within certain industries; and
- How to properly vet industry providers.

CAPTIVE INSURANCE 831(B)

Discussion and learning will include: What is Captive Insurance; Who is Eligible; What is Covered; How a Captive Differs from Commercial Coverage; How and When a Company Realizes the Return on Investment; Benefits and Structure of Captives and more

Participants who successfully complete this course will be able to:

- Understand the main benefits of captive insurance;
- Recognize the risk management purpose of using a captive, identify the elements of captive insurance, and recognize why a captive can insure many types of risks;
- Identify various types of exposures and possible coverages for the associated risks;
- Provide an overview of tax considerations; and
- Provide an overview of the captive formation process, importance of regulatory and compliance, and reputable captive management services.

About CPA to CPA, Inc.

CPA to CPA, Inc. is a CPA extension firm specializing in providing business tax strategies to CPA firms and industry professionals. We utilize multiple industries to obtain strategies for personal and business clients, and provide them in an unbiased and safe environment.

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