"Tax Planning Update for 2021"

Date: Thursday, January 14, 2021 ***Time:*** 9:00 am – 10:00 am ***Format:*** Lecture – 1.0 hour
Presenter: Bob Bradshaw, CPA
Location: Online Virtual Presentation via Zoom ***Phone:*** 419-764-4387

PROGRAM DESCRIPTION:

This presentation is intended to provide attendees with the 2021 income tax updates. It will also provide attendees with the information they need to help clients understand the current tax law changes and how it will affect them and provide information regarding estate planning in 2021 including the use of trusts for tax and non-tax reasons and strategies for dealing with irrevocable trusts.

PROGRAM OUTLINE

The following time components have been assigned to this topic to allow the presenters sufficient time to cover the subject matter.

I. Federal Tax Update 9:00 – 10:00 am
   a. CARES/HEROS ACT
   b. Payroll related items with COVID
   c. Other tax issues within tax reform
   d. Election planning

ABOUT THE PRESENTERS:

BOB BRADSHAW, CPA, is a Partner with William Vaughan Company who has more than 12 years of experience delivering comprehensive tax planning, consulting and compliance services to privately owned middle-market clients. As the firm's Manufacturing & Distribution Leader, he works closely within the industry to bring insight to improve efficiencies, reduce risk and offer solutions as market disruption continues. He is well-versed in industry trends, combined with industry 4.0 challenges, which enables him to bring significant value-added recommendations to his clients. A graduate of Adrian College, with a B.S. in Public Accounting, Bob is a member of the American Institute of Certified Public Accountants and the Ohio Society of Certified Public Accountants.

COURSE OBJECTIVES/PURPOSE:

After this course, participants should have a good understanding of the following:
- Entity structure and other tax implications
- The tax and non-tax benefits to comprehensive estate planning
- Understanding tax proposal and expected results from Congress

LEVEL OF INSTRUCTION: Intermediate/Advanced

INSTRUCTOR CRITERIA FOR CLASSROOM:

Instructors are selected, based on these criteria:
- Experience
- Knowledge & expertise on topic
- Teaching experience
- Professional credentials

Our instructors are well respected in the industry, with many years of work experience. Many are published authors who have been requested to appear on radio and television programs because of their expertise and they have presented programs across the country to attorneys, CPAs, CFPs, Trust Officers and financial planning professionals.

PROVIDER:

The Association Office – 7517 Wind River Drive, Sylvania OH 43560 Phone: 419-764-4387
Email: theassocoffice@gmail.com
OH Insurance Provider: #659 MI Insurance Provider: #0567 IN Insurance Provider: #82722
CFP Board of Standards Sponsor: #3038 OH Accountancy Board: #0268
Provider will apply for Ohio CLE credits for most programs