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Phoenix Tax Workshop

November 18, 2017

WORKSHOP FOCUS

CURRENT DEVELOPMENTS/6 FIGURE TAX SAVINGS/PI AWARDS/TAS

- A. DISCUSSION OF CURRENT DEVELOPMENTS.** Current tax issues, recent significant tax and business events, and practitioner comments will be reviewed and discussed.
STEPHEN J. RODIS, CPA — *Co-Chairman, Phoenix Tax Workshop; Wallace, Plese + Dreher, LLP*
steve@wpdcpa.com
- B. SIX FIGURE TAX SAVINGS USING QUALIFIED PLANS.** Our speakers will remind us about what occurred in 1974: President Nixon resigns; 8,000 Terracotta soldiers discovered; Muhammad Ali knocks out George Foreman; Lucy discovered, most complete early human skeleton; ERISA enacted into federal law. Forty-three years later, the rest is history, but ERISA continues to be an incredibly powerful tax savings and planning tool used by large and small business alike. Case studies presented demonstrate how qualified plans can solve common and unlikely client situations while generating substantial income tax savings.
ARMANDO G. ROMAN, CPA/PFS — *AXIOM Financial Advisory Group, LLC*
a.roman@axiomcorp.com
- HENRY DESPAIN, APA, QPA, ERPA** — *MGKS*
hdespain@mgks.com
- C. PERSONAL INJURY AWARDS.** Our Advisory Board member will walk us through the tax impact of the various types of PI awards.
KELLY C. MOONEY, ESQUIRE — *Gallagher & Kennedy*
kcm@gknet.com
- D. HOT TOPICS IN ADVOCACY.** Our Local Taxpayer Advocate will give us an overview of TAS' nationwide priorities.
CAROLINE E. WARE — *Local Taxpayer Advocate, Internal Revenue Service*
caroline.e.ware@irs.gov

2017-18 Workshop Dates: Jan 20 – Feb 17 – Apr 28

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