



April 2016

UPCOMING EVENTS

Elite Tax Planning Academy

June 13 & 14, 2016

Co-hosted with Certified Tax Coach, this educational event is designed to teach CPAs and financial advisors how to increase holistic and proactive planning, as well as learn from some of the top specialists in the country on a variety of planning topics. 16 free CPE credits offered. [Click here](#) to register.

ARTICLE OF THE MONTH

This month we'll dive into more detail on our June 13 and 14 Elite Tax Planning Academy. Remember, "education is a journey, not a destination."

The Elite Tax Planning Academy is a 2 day event (16 free CPE credits) that brings together some of the most forward-thinking professionals in the industry to teach financial advisors and tax practitioners how to work with a team of specialists to offer more proactive and comprehensive services to their clients. Each presenter is a specialist in their respective sections of the tax code. Over the 2-days, advisors and CPAs will learn about advanced planning techniques as well as cutting-edge business building skills.

In addition to an exceptional line-up of speakers, based on past attendee feedback, we will have a live panel discussion with three tax planning teams (advisors and CPAs) to allow attendees to hear first-hand about their experiences working with the CPA Team Based Model. In addition to the panel, there will also be breakout sessions allowing for more hands on case study reviews.

Technical Learning Objectives Include:

- * Tax Law Updates
- * Industry Changes
- * Qualified Retirement Plans
- * Nonqualified Retirement Plans
- * Captive Insurance Companies
- * Cost Segregation
- * Business Exit Planning
- * Cost Remediation
- * Advanced Income Tax Mitigation

Business Building Learning Objectives Include:

- * Value Based Pricing
- * Proactive Planning Conversations
- * Maximizing Joint Venture Partnerships

Interested in learning more about attending at NO COST? Email us at info@elitert.com or visit elitecpaacademy.com.

Continued success,

Anton Anderson



THE CPA TEAM BASED MODEL

The CPA Team Based Model is a proprietary system designed to help CPAs offer more proactive and holistic services to meet the continually-evolving needs and expectations of their clients. This is accomplished with the support and guidance of a specially-trained financial advisor, along with their top-notch team of specialists provided by ERT. When this partnership is developed with the mutual goal of delivering more meaningful value to the CPA's client, and the advisor becomes the go-to resource for all of the CPA's needs, a true win/win/win is created. Learn more at: www.elitert.com

OTHER EVENTS

July 26 & 27, 2016

CPA Team Based Model Institute

2-Day training event in San Diego for financial advisors interested in working with the CPA Team Based Model.



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