

Elite Tax Planning Academy

The Elite Tax Planning Academy is a 2 day event (16 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 (TBMCs 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:

- Asset Protection
- Succession Planning
- Qualified Retirement Plans
- Non-qualified Retirement Plans
- Captive Insurance Companies
- Cost Segregation
- Business Exit Planning
- Cost Remediation
- Advanced Income Tax Mitigation

Business Building Learning Objectives Include:

- Value Based Billing and Price Packaging
- Proactive Planning Conversations
- Maximize Joint Venture Partnerships
- Online Marketing



“I love what you guys are doing. Keep up the great work!”

—Ronald Baker, Author of six best-selling books, including *Measure What Matters to Customers* and *Firm of the Future*



“You’ve hit the nail on the head! This is a great opportunity for CPAs and I look forward to working with you.”

—Salim Omar, Author of *The Ultimate CPA Practice in the New Economy*

In a recent survey by the Sleeter Group, 72% of small business owners have changed their CPA because they only gave them “reactive services” instead of “proactive advice.” Attend the Elite Tax Planning Academy to make sure your clients don’t add to that statistic!



June 15 & 16, 2017

Additional Information: Conference participants can earn up to 16 CPE credits in Administrative Practice, Business Management, Communications, Marketing, Personal Development, and Specialized Knowledge.

Delivery Method: Group-Live

Prerequisites: Previous experience in preparing individual and business tax returns.

Advanced Preparation: Meet with a CPA Team Based Model Consultant for introduction to concept and event.

Program Level: Intermediate

Conference Policies: This is a free event for CPAs working with TBM Consultants. For more information regarding complaints, please contact our office at 888.626.9672.

REGISTER BY CALLING

888.626.9672, Ext. 4

Or Visit www.eliteCPAacademy.com



Elite Resource Team, LLC is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have the final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.learningmarket.org.



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June 15 & 16, 2017

Marriott Marquis,
333 W. Harbor Drive, San Diego, CA 92101



16 CPE CREDITS

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Mentioned on:





In the last five to ten years there's been a dramatic shift in what people want and need from their CPAs. As the AICPA put it, CPAs are now expected to be their clients' "most trusted business advisors," and as CPA Horizons 2025 pointed out, a CPA is no longer defined by "traditional services such as tax preparation, audits, and financial statements."

In this shifting landscape, firms that will thrive in the future will learn how to use this trend to their advantage, rather than struggle against it. By applying the fundamental characteristics of a Family Office to the small and mid-sized accounting firm, a CPA can dramatically increase their value proposition to a client and increase their profitability without having to become a "jack of all trades."

FEEDBACK FROM PAST ATTENDEES

"Exceptional event! Great subject matter, superb presenters, excellent moderators, and wonderful environment."

–Ron Blumka, CPA

"Well worth it! The event focused on ways to actually work better with my clients rather than just the technical codes."

–Jacob Lincoln, CPA

"I've never been more excited about my career. Definitely an event you don't want to miss!"

–Dave Morgan, CPA

"Loved it! Event was fantastic."

–Linda Catalina, CPA

Elite Tax Planning Academy Speakers

Andrew Argue, CPA – Marketing and Sales Consultant for Accountants



Mr. Argue is a CPA and owner of The Argue Company, which is one of the nation's leading consulting companies for accountants. Andrew has personally coached over 300 accountants in 5 countries, and helped them understand how to start and grow hyper profitable accounting practices.

Andrew believes that the number one problem of most accountants is that they think incredibly small, and they have accepted limits for themselves based on the industry norms. His goal is to help his clients produce results far beyond their competitors.

Ken Smith, Elite Resource Team – Maximizing the CPA Team Based Model



Mr. Smith began his career in 1993 working with Lincoln National. He graduated from Tampa College with a degree in Management and Marketing. After starting his own financial advisory firm in 1994, his focus shifted to financial planning with a tax mitigation emphasis. In 2003, he developed an expertise in tax efficient retirement planning, which allowed him to maintain his position in the top 1% of all financial professionals. In total, he qualified in the top 1% for 18 straight years of his career.

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Anton Anderson, Elite Resource Team – Leveraging Technology



Mr. Anderson began his career in 2003 with Smith Barney while studying business. He graduated from the University of California, Santa Barbara in the top 3% of his class. In 2008 he co-founded SPL Financial, which grew into a thriving practice. He has developed a diverse career as an investor, advisor, and CPA consultant. He's also developed patent-pending systems that leverage technology to provide more proactive and holistic advice for CPAs' clients.

Joel Grushkin, Cost Segregation Initiatives (CSI) – Cost Segregation



Mr. Grushkin is Regional Director of Cost Segregation Initiatives (CSI). Joel brings nearly 40 years of executive experience to the CSI organization. His background includes 11 years with Arthur Young & Company (now Ernst & Young) as a Principal and director of the firm's Management

Services Practice. He was also a member of AY's National Real Estate Industry Specialty Practice Group.

Richard Montellano, Above the Standard – Cost Remediation



Mr. Montellano is a supply chain executive with more than 25 years of experience in the manufacturing and distribution environments. He is passionate about helping companies create effective solutions that have and continue to create significant savings to their bottom lines. He has experience across industries such as aerospace, hospitality, industrial, consumer goods, medical, and many others. Richard has also led numerous ERP (Enterprise Resource Planning) implementation solutions for organizations around the globe.

Craig Sullivan, Sullivan Lavin Associates – Ideal Plan



Mr. Sullivan is an attorney specializing in tax planning, business planning, estate planning and asset protection. In 1999 he created the IDEAL Plan, which is his proprietary tax reduction and financial planning strategy. The IDEAL Plan™ creates tax-free client income and removes assets from the reach of potential creditors, while leaving the client (and family) in complete control of the assets for multiple generations. He has focused on the advanced planning needs of financial service professionals, CPAs, and their clients.

Ralph Nelson, JD, CPA, Heritage Advisors LLC – Advanced Tax Mitigation



Mr. Nelson, an attorney and CPA, is one of the founders of Heritage Advisors, LLC where they combined tax, law, wealth management, and insurance practices to provide a specialized family office experience. Ralph works primarily with small business owners and high-income taxpayers to develop leveraged estate and gifting strategies. Prior to establishing Heritage Advisors, Ralph was a practicing tax attorney with Deloitte and Touche, LLP in their Mergers and Acquisitions group. He has an expertise in IRS Audit Representation to settle tax controversy, as well as audit field work pursuant to SEC guidelines.

Michael Frost, Heritage Advisors LLC – RIA



Mr. Frost is the co-founder of Heritage Advisors, and has spent his career as a wealth manager and investment banker for many of the most prestigious financial institutions in the country. In 2011 Michael opened his own Registered Investment Advisor Firm and aligned himself with the sophisticated planners at Nelson Law Firm. With an emphasis on true independent non-bias financial services, Michael brings his experience in investment management, financial planning, private banking, investment banking, insurance plan design, and special financing needs to the Heritage team.

Michael Moore, CLU, ChFC, CDP Insurance Services, LLC– Complex Financed Life Insurance Solutions



Mr. Moore brings 19 years of insurance experience from retail, wholesale and banking marketplace perspectives. He utilizes product knowledge and capital relationships in helping to design and navigate complex financed life insurance solutions for high net worth clients. Michael ran the processing department of a large brokerage general agency, was Vice President of Sales and Marketing for a national producer group and Vice President of sales for the largest premium finance lender in North America. Michael holds The American College Chartered Life Underwriter and Chartered Financial Consultant designations.

Rick McElvain, Tax Veracity – Research and Experimentation Tax Credits



Mr. McElvain is a principal partner at Veracity and has been in the business of scoping and selling specialty tax services since 2007. He holds a degree in Economics from Cal State Northridge. A former infantry officer in the USMC, Rick brings true leadership skills to the firm. He is an active Rotarian and has a deep passion for sailing. Rick's direct, no-nonsense approach inspires confidence in his customers and staff members.

Keith Langlands, CPA, Synergy Captives – Captive Insurance Companies



Mr. Langlands is President and Managing Partner of Synergy Captive Strategies (SCS). Founded in 2008, SCS provides innovative captive insurance formation, management, and alternative risk transfer strategies for middle market companies, which allows them the ability to reduce insurance costs, increase cash flow, and better leverage every dollar earned. With more than 25 years of experience in the financial sector, Mr. Langlands is a leading expert in the captive arena. His proficiency as a CPA, servicing high net worth clients while providing strategic advice regarding accumulating and protecting wealth, reducing insurance costs, improving cash flow and controlling and managing risks.