



May 2016

## UPCOMING EVENTS

### Educational Webinar

**Wednesday May 18, 8:30am - 9:30am PST**

**International Tax Planning and the Use of Life Insurance**, with Special Guest **Jonathan Mintz**, partner at Matsen Voorhees MintzLLP

A presentation on practical strategies for international tax planning with focus on the use of life insurance, and how non-citizens can minimize both US income and transfer (gift, estate and generation-skipping transfer) taxes. **Registration link:**

<https://attendee.gotowebinar.com/register/3527479966128637698>

### 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

### "Tax Avoidance" vs. "Tax Evasion"

Is there a difference between "tax avoidance" and "tax evasion?" The answer is yes, and it is a very big difference in fact.

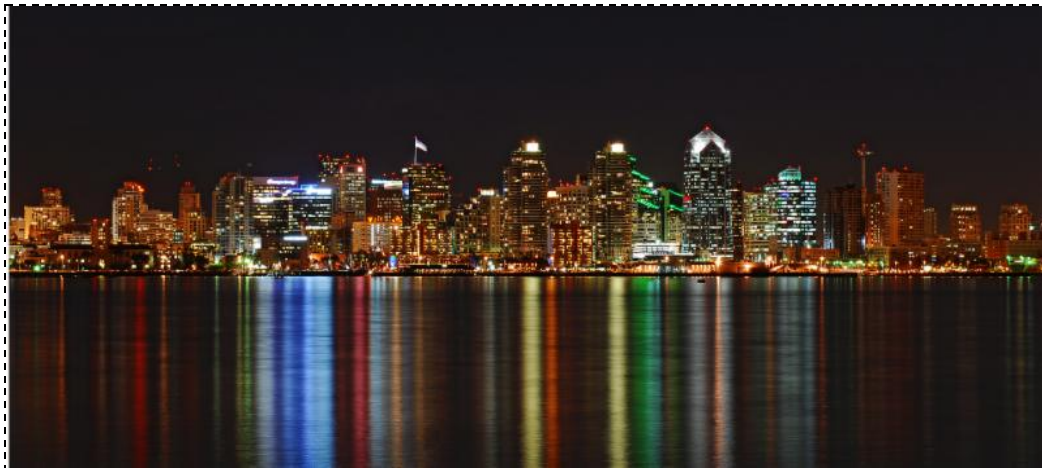
Rather than take my word for it, I'd like to share a well know legal opinion by the US Supreme Court Justice Louis D. Brandis.

"I live in Alexandria, Virginia. Near the Supreme Court chamber is a toll bridge across the Potomac. When in a rush I pay the Dollar toll and get home early. However, I usually drive a free bridge outside the downtown section of the city, and cross the Potomac on a free bridge. The bridge was placed outside the downtown Washington D.C. area to serve a useful social service: getting drivers to drive the extra mile to help alleviate congestion during rush hour. If I went over the toll bridge and through the barrier without paying the toll, I would be committing tax evasion. If,

however, I drive the extra mile and drive outside the city of Washington, I am using a legitimate, logical and suitable method of tax avoidance, and I am performing a useful social service by doing so. For my tax evasion, I should be punished. For my tax avoidance, I should be commended. The tragedy of life today is that so few people know that the free bridge even exists."

Do your clients know that the free bridges exist? If not, who is teaching them?

Anton Anderson, Co-Founder of Elite Resource Team



## 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](http://www.elitert.com)

## OTHER EVENTS

### **July 26 & 27, CPA Team Based Model Institute**

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



**STAY CONNECTED**

Like us on Facebook 

Follow us on  twitter

402 West Broadway, Suite 400  
San Diego, CA 92101  
T: 888.626.9672 F: 949.209.1804  
Email: [info@eliter.com](mailto:info@eliter.com)  
Website: [www.eliter.com](http://www.eliter.com)

SAND, 402 West Broadway, Suite 400, San Diego, CA 92101

SafeUnsubscribe™ {recipient's email}

[Forward this email](#) | [Update Profile](#) | [About our service provider](#)

Sent by [info@eliter.com](mailto:info@eliter.com) in collaboration with



Try it free today