



YOUR TAX BILL IS TOO HIGH

STRATEGIES AND TIPS FOR REDUCING YOUR CORPORATE AND INDIVIDUAL TAX EXPENSE

Presented by **GENE MARKS**



Whether you're a financial person or not, this presentation is critical for your business. Why? Because taxes represent the biggest expense you have in your organization and personally. Minimizing your tax expense will free up capital to invest, hire and save. Knowing the tax breaks and incentives that you can use will help you defer the costs of bringing on great people and growing your business. Both the 2017 Tax Reform bill and recent legislation like the Inflation Reduction Act include significant provisions that have a material impact on your business - and personal life too. But that's just the beginning! You don't need to be a financial expert to understand all the ins and outs of tax legislation. You just need to know the issues and questions to ask your accountant. That's the objective of this presentation.

Join author, columnist and CPA **Gene Marks** for a fast paced, entertaining but very detailed discussion of how tax reform will affect you, your company and your employees.

During this lively presentation Gene will cover the following topics:

- ✓ The organizational structure that's right for your business
- ✓ COVID stimulus tax breaks that are still applicable today
- ✓ New energy efficiency and vehicle tax credits to leverage in your business and personally
- ✓ Moves to lower taxes on your compensation
- ✓ Property and equipment investments that qualify for tax breaks
- ✓ Special employee related credits to help reduce the costs of compensation and benefit plans, including healthcare
- ✓ An update on tax rates, rules and strategies for your company's retirement plans
- ✓ Tax considerations when exiting your business
- ✓ Key questions you should be asking your accountant

"Amazed beyond words at your presentation today for the CALCPA. Wow! So much information, presented in a cogent and creative manner. Time just flew."

Jonathan J. Wernick
Managing Director
B. Riley Advisory Services

"I was an attendee at the NPCA Convention last week, and I thoroughly enjoyed your presentations. I can't remember the last time an accountant was so interesting! There were many great takeaways."

Adam W. San Solo, P.E.
Director of Sales & Engineering
US Foundry

"First, I'd like to say that was an incredible presentation. It's rare that someone can hold attention for that long especially in a zoom style setting. Fantastic job!"

Todd Witherspoon
President
Cutter Diamond Products

Gene's presentations help business owners & managers look ahead, making sure they are educated on critical issues affecting their industries.

Book Gene for your keynote or breakout session



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See Gene in Action www.GeneMarks.com



GENE MARKS

AUTHOR. COLUMNIST. KEYNOTE SPEAKER. BUSINESS EXPERT.

The New York Times *The Washington Post*
The Hill *The Philadelphia Inquirer* *Forbes* *Entrepreneur.com* *The Guardian*

A past columnist for both *The New York Times* and *The Washington Post*, Gene now writes regularly for *The Hill*, *The Philadelphia Inquirer*, *Forbes*, *Inc. Magazine*, *Entrepreneur Magazine* and *The Guardian*.

Gene has written 5 books on business management, specifically geared towards small and medium sized companies. His most recent is *Want More Cash?: 100+ Ideas And Strategies For Increasing Your Company's Cash Flow This Year*.

Nationally, Gene appears regularly on Fox Business, MSNBC, as well as CBS Eye on the World with John Batchelor and SiriusXM's Wharton Business Channel where he talks about the financial, economic and technology issues that affect business leaders today.

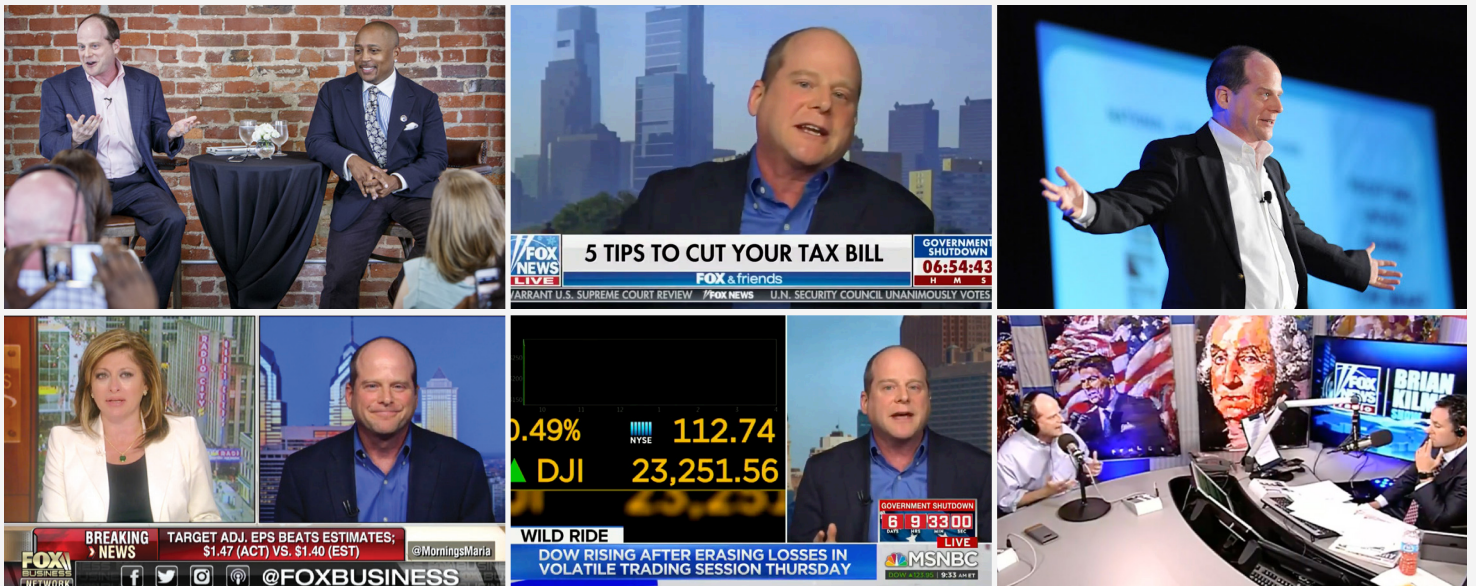
Through his keynotes and breakout sessions, Gene helps business owners, executives and managers understand the political, economic and technological trends that will affect their companies and—most importantly—the actions they can take to continue to grow and profit.

Gene owns and operates the Marks Group PC, a highly successful ten-person firm that provides technology and consulting services to small and medium sized businesses.

Prior to starting the Marks Group PC Gene, a Certified Public Accountant, spent nine years in the entrepreneurial services arm of the international consulting firm KPMG in Philadelphia where he was a Senior Manager.

Gene also hosts two very popular podcasts: *Thrive*, sponsored by Paychex; and *Small Biz Ahead*, sponsored by The Hartford Insurance.

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Gene was a huge hit. I commented “what a way to close the conference.”

Lynn Smith, Manager of Meetings, The American Foundry Society (AFS)

Our group enjoyed Gene—his was the highest rated presentation at PEMA's Annual Meeting.

Susan A. Denston, QAS, Executive Director, Process Equipment Manufacturers' Association

Gene, hands down one of my favorite things last week at the WWEMA conference was your presentation. When you get a chance can you forward your presentation to me.

Rich Cavagnaro, President & CEO, AdEdge Water Technologies/Water & Wastewater Equipment Manufacturer's Association

