

Strategies For
Business Owners
and Managers of
ALL Ages To Build
And Grow A High
Value Company

BUILDING VALUE: 2023 TAX STRATEGIES

Deduction, credits and other moves to
reduce your tax bill and retain your profits

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

GENE
MARKS

**AUTHOR. COLUMNIST.
KEYNOTE SPEAKER.
BUSINESS ADVISOR.**



Forbes
The Guardian



The Washington Post

The Philadelphia Inquirer

The New York Times

Entrepreneur.com

Gene's presentations help business owners and managers of all industries to look ahead, with specific actions for growing and profiting based on the strategies of other business owners in their industry.

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 ADVISOR.

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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TESTIMONIALS

👍 "Good morning, Gene, Without a doubt, your presentation was the best closing session I have ever attended. I know you are doing the kickoff for Symposium and I'm sure I will be saying the same for the kickoff session. Somehow, you managed to make all the tough news entertaining. It was a master class on presenting." — *Lewis Linda Dodd, Learning Specialist, North Carolina Association of CPAs*

👍 "In a word.... WOW! Gene absolutely delivered. He was spot on for our small business members. He packed a lot into 45 minutes and left everyone with something to take away. People were taking pictures of his slides during his presentation. The conversations about his keynote continued throughout the day. People said they emailed him right after he got off stage. Others mentioned that they were emailing their own accountants to find out if the advice he was giving could help them. They found out that they were entitled to tax relief or grants that would basically offset their price of attending our show. That is a tremendous value for our members. We could not be happier. He was fantastic." — *Mike Adamson, President & CEO The Aircraft Electronics Association*

👍 "Gene, I would say in my 30 years of attending presentations, yours was THE MOST: valuable, relevant, properly paced, perfect amount of info; not too much, but enough, excellent humor, and perfectly executed presentation I have experienced." — *Jill Keim, VP Relationship Manager, First Merchants Bank*

👍 "Gene was a huge hit again. We have never brought a speaker in back to back years. Gene certainly was worthy and delivered again!" — *Kevin Gilbride, Executive Director, The Accredited Snow Contractors Association*

