expand your capabilities

habu™ accelerator conference

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about habu accelerator conference

The Habu Accelerator Conference was created to help CPA firm's assist their small business clients in tax optimization. We do this by bringing together the most significant vendors in the community that work in specialty tax codes. It's about simplifying complicated tax codes for the accounting community to better help their clients.

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about engineered advisory accelerator

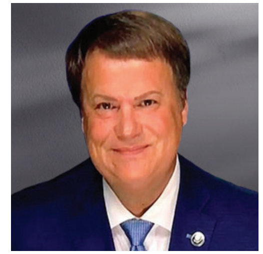
A cohort of advisory minded public accounting firms focused on providing exceptional service to clients by functioning as trusted in-depth advisors.

The Advisory Accelerator was created for CPAs who want to offer a full range of advisory services outside their personal expertise to their clients. Their clients get access to leading, strictly vetted professionals across a wide range of the advisory spectrum.

Our specialized experts work behind the scenes to help our members "punch above your weight class" and drive significant value into their client relationships, while holding competitors at bay.

ADVISORY accelerator

meet our team



Julio Gonzalez

Founder and Chief Executive Officer

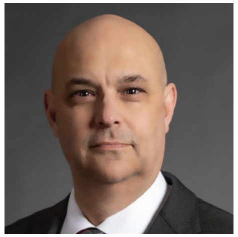
Mr. Julio P. Gonzalez founded the Gonzalez Family Office and is the CEO and Founder of Engineered Tax Services, Inc. (ETS). ETS is the country's largest specialty tax engineering firm which specializes in the preservation of wealth and United States' job creation through IRS engineering-based services to include research and development manufacturing tax credit and grant studies, energy tax incentives studies, cost segregation deprecation studies for buildings, Opportunity Zone studies, real estate state and local incentive studies and alternative tax optimization studies.

Mr. Gonzalez started ETS in 2001 to bring specialized engineering tax studies to mainstream America, which have historically only available to the Fortune 500 and public companies through then the Big 8 National Accounting Firms. ETS has 26 offices nationally and is headquartered in West Palm Beach, Florida.

In addition to ETS, Mr. Gonzalez started several other family operational companies including his family office, Gonzalez Family Office (GFO), Calle Gato Ocho (CGO), Engineered Tax Exchange (ETE) and Engineered Family Office (EFO). Gonzalez Family Office manages the Gonzalez family capital by investing primarily in real estate, private equity, and venture capital. CGO owns and operates direct real estate investments in multi-family housing and office/mixed-use real estate for the Gonzalez family.

Mr. Gonzalez works weekly in Washington D.C. to work with the administration, Congress and Senate to advise on tax reform and is the go-to tax expert representing many national organizations and associations. He is a regular public speaker on a national level regarding tax reform and tax sophistication for wealth preservation.

engineered ADVISORY

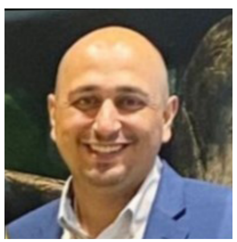


Jeffery S. Pawlow | President

As the President of the Engineered Advisory family of companies, Jeff leads a dynamic team of professionals who are dedicated to helping their clients succeed. Jeff's passion is activating the synergies exist among all of the Engineered Advisory (EA) companies and unleashing the talent of the EA team to better support their clientele: CPA Firms, Architectural Firms and High Net Worth Individuals.

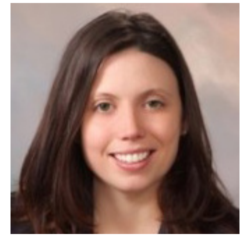
Tess Honan | Chief Operating Officer

Tess has overall strategic and operational responsibility for Engineered Advisory' employees, performance, and execution of its missions and goals, while providing day-to-day management for the Engineered Advisory Group. Previously she was Manager, Continuous Improvement at Engineered Advisory. She holds a B.A. degree in Hotel and Event Management from the University of Central Florida and is a Level 1 Sommelier.



Francisco Lujan | Chief Investment Officer and Director of Strategic Partnerships

Francisco Lujan is a visionary, creator, seasoned entrepreneur, and investor. His specialty is building internationally scalable solutions-based businesses in the software and technology space. He has worked closely with Fortune 500 companies and professional athletes and has lead companies through acquisitions and developed multimillion-dollar businesses in his career.



Amanda Garner | Principal

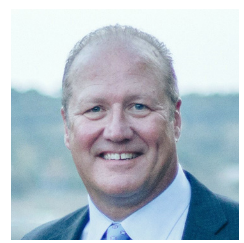
Amanda's passion is creating effective marketing and communications programs for the clients she serves. She leads the Outsourced Marketing Division of The Growth Partnership, and has worked with TGP since 2002. In addition to professional services marketing, Amanda's background includes years working with various media outlets as a producer and on-air talent.

Daniel Plant | Vice President of Marketing

With a wealth of expertise and dedication, Daniel is a seasoned and driven Vice President (VP) of Marketing specializing in developing and executing impactful and successful marketing strategies. Leading a dynamic team of creatives in alignment with business objectives across all four Engineered Advisory entities.

Lynn Prange | LMS Program Manager

As Learning Management System Program Manager, Lynn's mission is to create an unforgettable experience for her clients internally and externally. She works collaboratively with her clients to create custom learning solutions. In addition, Lynn is part of the Engineered Advisory Accelerator team and guides the planning and execution of the annual HABU conference. She also manages the logistics for all The Growth Partnership's training programs.



Jerry Winkelmann | VP of Strategic Partnerships

Jerry Winkelmann is the Vice President of Strategic Alliances at Engineered Advisory, where he oversees Engineered Advisory Strategic Partnerships to mitigate tax liabilities and preserve the wealth of our network. With a long history of outstanding success in sales and B2B senior management, Jerry is passionate about helping businesses succeed.

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event schedule

Monday, July 31, 2023

Registration & Welcome Reception
5:00-6:30pm

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Tuesday, August 1, 2023

Breakfast
7:30-8:30am

Session 1
8:30-8:40am | Amanda Garner
Welcome/Introductions

8:40-9:10am | Jeff Pawlow
Keynote Speaker - Empowering Firm Success

9:10-9:30am | Michael Wall
Using Land Preservation as a Tax Mitigation Strategy

9:30-9:50am | Warren Kirshenbaum + Melina Ambrosino
Offsetting Taxes for Commercial Real Estate Investors

Break/Networking
9:50-10:30am

Session 2
10:30-10:50am | Josh Cordle + David Ronen
Capitalizing on American Grown Solar Energy

10:50-11:10am | David Spray
Understanding IC-DISC, the What, How and Who

11:10-11:30am | Jonathon Morrison
Setting Up the Optimized CLAT: The Holy Grail of Income Tax Deduction Strategies

11:30-11:50am | Rob Foster
Creating Portfolio Value Through Property Tax Management

Luncheon & Exhibits
11:50am-1:00pm

Session 3
1:00-1:20pm | Quinn Ricker
Using Private Aviation as Tax Minimization Strategy

1:20-1:40pm | Angel Way
Onshoring with a Virtual Tax Office

1:40-2:00pm | Jamie Lujan + Joyce Salazar
Understanding the Power of Grant Funding in a For-Profit Business

2:00-2:20pm | Matt Vaadi
Exploring the Future of Payroll and How AI Changes the Landscape

Break/Networking
2:20-3:00pm

Session 4
3:00-3:20pm | Nick Burgess
Using Premium Financed Life Insurance as an Estate Strategy

3:20-3:40pm | Nick Sinclair
Solving the Talent Crisis

3:40-4:00pm | Benny Wright
Protecting Wealth When Disaster Strikes

4:00-4:20pm | Jerry Vaughn
Helping Small Businesses Scale with Credit and Financing

4:20-4:30pm
End of Day/Closing Statements

Cocktail Reception
4:30-6:00pm

CAP/MAP - Sponsored Dinners
6:00pm

Wednesday, August 2, 2023

Breakfast
7:30-8:30am

Session 1
8:30-8:40am | Amanda Garner
Recap

8:40-9:00am | Vince Nelson
Reviewing Unique Tax Mitigating Investment Strategies

9:00-9:20am | Mike D'Onofrio
Understanding New Cost Segregation Strategies to Maximize Your Benefit

9:20-9:40am | Louie Rosalez
Looking at Volatility as a Catalyst to Grow Your Business

Break/Networking
9:40-10:20am

Session 2
10:20-10:40am | Karl Francetic
Using Real Estate as a Tax-Advantaged Alternative Investment Strategy

10:40-11:00am | Sara Huddleston
Leveraging Learning Opportunities to Bolster Organizational Identity

11:00-11:20am | Kim Lochridge
Uncovering the Power of R&D and Understanding Recent Updates

11:20-11:40am | Michael Scherer
Navigating the 1031 Exchange Life Cycle

Luncheon & Exhibits
11:40am-12:50pm

Session 3
12:50-1:10pm | Patrick Morrell
Relieving the Management Pains Felt by Today's CPA Firm Leaders

1:10-1:30pm | Shawn Long
Learning the Great Cybersecurity Acronym

1:30-1:50pm | Heidi Henderson
Exploring the Changes for 179D and 45L Incentives Related to Energy Efficient Buildings

1:50-2:10pm | Pickens Calhoun
Defining Best Practices for WOTC Optimization

2:10-2:30 | Brad Gornto
Compelling Tax Mitigation: Immediate Tax Savings from Clients' Future Charitable Gifts

Break/Networking
2:30-3:00pm

Session 4
3:00-4:00pm | Jeff Pawlow
Advisory Accelerator Ecosystem Overview

scan for more event information

*Speakers, presentation and/or presentation times on this agenda are subject to change

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presentations and notes

Presentations

Empowering Firm Success and Advisory Accelerator Ecosystem Overview

Speaker: Jeff Pawlow | Engineered Advisory

About Speaker

As the President of the Engineered Advisory family of companies, Jeff leads a dynamic team of professionals who are dedicated to helping their clients succeed.

Jeff's passion is activating the synergies exist among all of the Engineered Advisory (EA) companies and unleashing the talent of the EA team to better support their clientele: CPA Firms, Architectural Firms and High Net Worth Individuals.

Presentation Overview

Today's clients demand more from their CPAs than ever before, but we've yet to find a firm that has a supply of non-billable hours just laying around that they can't decide what to do with. As a member of the Advisory Accelerator, our hope is that we will help your firm bridge this "Advisory Gap" by expanding your firm's offerings through our network of proven providers and HABU tools. In this session we'll cover everything that is at your disposal as a member and make sure you leave the conference primed for immediate success!

engineered™ ADVISORY

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Presentation

Using Land Preservation as a **Tax Mitigation Strategy**

Speaker: Michael Wall | InVia Capital

About Speaker

Michael is the Chief Marketing Officer for InVia Capital. He is also the Founder and President of Wall Private Wealth, inc, U.S. Private Wealth,LLC, Michael D Wall, LLC, and Go Live With Purpose™. He is a husband, father, author, speaker, and host of two dynamic podcasts heard in over 100 countries: The Michael Wall Show and The Invest Well Show.

Michael spent over 6 years contributing to national media outlets such as CNBC, Fox Business, Bloomberg, the Wall Street Journal, Forbes as well as others. He has coached over 120 advisors throughout the country with strategies to help bring value based planning to their clients and grow their companies efficiently.

Michael began his career in the financial industry in 2002. Since that time, he has experienced great success while following his passion to help families protect, grow, and reduce taxes on their wealth.

Presentation Overview

Uncovering Section 170(h) of the IRS Code and how to offer your clients the opportunity to potentially reduce ordinary income tax by 50% annually through a simple, streamlined structure.

INVIA CAPITAL

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Presentation

Offsetting Taxes for Commercial Real Estate Investors

Speaker: Warren Kirshenbaum | Cherrytree Group LLC

About Speaker

Warren founded Cherrytree in 2011 and has spent the past eleven years building a highly specialized tax credit consultation, brokerage, and syndication firm.

He has relied on three decades of experience and a law background to focus on the structural and development finance aspects of tax incentivized real estate-based transactions — particularly in the environmental remediation (Brownfields), renewable energy, and historic rehabilitation areas.

Presentation Overview

The Inflation Reduction Act (which I'll nickname as the "Climate Tax Bill"), expands the use of Federal tax credits to advance climate stabilization goals and attempt to curb global warming. In doing so, this bill lays bare the power and reach of the U.S. Tax Code to harness renewable energy as a tool to achieve economic security.

This presentation will focus on the provisions of the bill that relate directly to the Investment Tax Credit ITC and, specifically, how it pertains to the financing of commercial and industrial or utility-scale solar projects.

Cherrytree Group
Sophistication, Value and Follow-Through.

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Presentation

Capitalizing on American Grown Solar Energy

Speaker: Josh Cordle | Sun Farmer's Group, LLC.

About Speaker

Josh is a husband and proud father of four. Being a native of North Georgia, he's proud of his rural roots and credits it as the spark for creating the Sunfarmer's Group.
He brings over 20 years of business leadership experience. His passion is leading his team in creating and delivering renewable energy solutions to the agriculture and commercial markets. His goal is to fight for solutions that make renewable energy financially sensible and more easily attainable for all.

Presentation Overview

Highlighting recent changes in the law regarding the use of solar energy and explaining the Sun Farmer's Group process.

SUN FARMER'S
GROUP

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Presentation

Understanding IC-DISC, the What, How and Who

Speaker: David Spray | IC-DISC Alliance

About Speaker

Dave Spray is the founder and President of Export Advisors, which serves the owners of privately-held, U.S. companies that export. Over the past 20 years, the firm has created more than $400 million in wealth for hundreds of entrepreneurs and their families from the IC-DISC tax savings program.

Dave has a BBA in accounting from the University of Texas and an MBA from the University of Houston. He and his wife Christine are avid cyclists and mountain climbers and split their time between Houston and Breckenridge, CO.

Presentation Overview

Let's jump into the fascinating world of IC-DISC (Interest-Charge Domestic International Sales Corporation) and uncover how this powerful program can revolutionize your export tax savings.

During this session, David Spray will guide you through a step-by-step overview of IC-DISC, shedding light on its benefits, eligibility criteria, and implementation strategies. Whether you're a business owner, tax professional, or finance executive, this presentation is a must-attend session for unlocking the potential of IC-DISC.

IC-DISC ALLIANCE™

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Presentation

Setting Up the Optimized CLAT:

The Holy Grail of Income Tax Deduction Strategies

Speaker: Jonathon M. Morrison, Esq. | Frazer, Ryan, Goldberg & Arnold LLP

About Speaker

A senior partner and Best Lawyers honoree, Jonathon Morrison's practice is focused on tax, business and estate planning for clients with large or complex estates. He is licensed in both Arizona and California and is a Certified Specialist in Estate Planning, Trust and Probate Law in California.

A Forbes contributor, Jonathon is widely viewed as a thought leader and innovator in estate planning and related tax strategies.

Presentation Overview

Jonathon will introduce the Optimized CLAT (OCLAT), a powerful, peer-reviewed income tax deduction strategy for clients that have high incomes and/or large capital gain events. The presentation will detail how clients can fund the OCLAT with cash, stock, or real estate every tax year to reduce federal and state taxes by up to 30%, regardless of their income.

The discussion will cover the many benefits of the OCLAT, including its retirement savings, asset protection and generational wealth transfer benefits.

Jonathon will discuss how the OCLAT increases AUM by using the "1-2-5" rule: For every $1 million contributed, there is a $1 million tax deduction, ~$2 million to charity, and ~$5 million returned to the client at year 30 (without gift/income taxes). Jonathon will conclude with a discussion of his process and how he has made the OCLAT tax filing process easy for CPAs.

Frazer Ryan Goldberg & Arnold LLP

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Presentation

Creating Portfolio Value Through **Property Tax Management**

Speaker: Rob Foster | Ryan LLC

About Speaker

Rob is responsible for strategy development and execution of Ryan's Tax as a Service platform. He brings a passion for helping clients through holistic tax and technology solutions and is driving Ryan's digital-first strategy. Rob draws on years of experience collaborating with clients of all sizes on tax minimization strategies, providing the optimum combination of service delivery, data solutions, and technologies to help clients reach their short- and long-term goals.

With more than 25 years of leadership experience in the state and local tax industry, Rob brings new and innovative data and technology solutions to solve client tax challenges and drive growth strategies.

Presentation Overview

We will examine several strategies for minimizing Property Tax Liabilities through both technology and consulting applications.

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Presentation

Using Private Aviation as Tax Minimization Strategy

Speaker: Quinn Ricker | Jet Access

About Speaker

As the CEO of Jet Access, Quinn Ricker has applied his proven leadership style and ability to leverage technology into the fast-paced and growing aviation industry. The entrepreneurial-minded Ricker is a recognized expert in business processes and optimization.

Ricker served as President and CEO of Ricker Oil for 14 years and led the company to become one of the Top 100 Places to Work in Indiana. A graduate of Purdue University, Ricker obtained a master's in business administration from Anderson University and continues to focus on strategic growth and leadership development through his role at Jet Access.

JET ACCESS

Presentation Overview

Jet Access is the first vertically integrated and fully transparent full-service aviation management company in the industry. They are committed to making private jet travel safe, cost-effective, uncomplicated, and comfortable.

Jet Access provides the full suite of aviation services, including private jet charter, aircraft management, FBO and airport management, maintenance, sales and acquisitions, and flight training. Their strategic ecosystem provides an unparalleled value proposition in business aviation.

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Presentation

Onshoring with a **Virtual Tax Office**

Speaker: Angel Way | Paragon Tax Advisory Services, LLC

About Speaker

Angel R. Way, RFC® is the Founding Advisor of Way Street Financial, Inc. and Chief Operating Officer of Paragon Tax Advisory Services, LLC. As a 2nd generation Financial Professional, she understands that people, processes, and purpose must all be aligned.

Angel works directly with her clients to deliver peace of mind through a disciplined investment approach. Understanding the needs of CPAs, Attorneys, Financial Advisors, and Tax Planners allows Angel to build effective marketing and operational processes to keep professionals in front of qualified prospects on a favorable basis.

PARAGON
Tax Advisory Services

Angel is a registered member of the National Ethics Association and holds an MBA degree in business Marketing and Administration. Specializing in estate planning, custom-fit wealth creation, investment management, and income planning, Angel is often hired by high-net-worth families to serve as a generational bridge in the income, retirement, and estate planning process.

Presentation Overview

The Paragon Secure Cloud is a virtual system that connects tax offices to CPAs to complete tax returns. The Secure Cloud has fixed pricing to ensure you can build in profit to your return or break even if you have clients that profit it made in other areas. The members of the Paragon Secure Cloud are US based preparers that just happen to love completing tax returns.

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Presentation

Understanding the **Power of Grant Funding** in a **For-Profit Business**

Speakers: Joyce Salazar & Jamie Lujan | Engineered Tax Services

About Speakers

Joyce Salazar's 28 years of experience in project creation, grant funding, capital raising, and project management provides a unique combination of proven skills that enhance a project's ability to obtain substantive grant funding through a variety of sources and ultimately have successful outcomes.

Jamie Lujan has spent her career in entrepreneurship, equity, and education. Currently, she is the Director of Operations for Grant Services at Engineered Tax Services and founder of Saluzo Business Solutions. Her focus is centered on operations and scaling business growth by bringing in mission-aligned capital and utilizing values-based decision-making.

Presentation Overview

Public and private grant dollars go unused every year. Learn how for-profit businesses can take advantage of these non-dilutive dollars and bring quality funding to the capital stack. Engineered Tax Services (ETS) Grant Services is your partner in securing these grant dollars.

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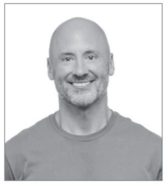
Presentation

Exploring the Future of Payroll and How AI Changes the Landscape

Speaker: Matt Vaadi | guHRoo Payroll & HR



About Speaker

Matt Vaadi is a dedicated social entrepreneur, best-selling author, and dynamic speaker with an unwavering commitment to creating better workplaces and helping small businesses thrive. Known for his compassionate, strategic approach to leadership, Matt is the CEO of guHRoo payroll & HR, a software and outsourcing firm based in Columbia, SC that equips small to medium-sized businesses with simple, user-friendly software and expert support for payroll, benefits, HR, and compliance.

Presentation Overview

Learn how to future-proof your organization, improve your bottom line, and make a difference in your community amidst the AI revolution. With real-world examples and practical strategies, he'll show how AI can boost efficiency, accuracy, and cost-effectiveness in payroll systems.

In this talk you can expect to learn the following (and more):

- The Current State of Payroll
- AI and the Future of Payroll
- Case Study: guHRoo's Approach to AI-Powered Payroll
- Preparing for the AI Revolution in Payroll
- The Broader Implications of AI in HR and Business

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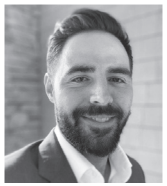
Presentation

Using Premium Financed Life Insurance as an Estate Strategy

Speaker: Nick Burgess | The Burgess Group



About Speaker

Nick Burgess is a principal in The Burgess Group (TBG). Nick started with TBG in 2005. His focus is building regional and national strategic alliances. In addition, providing sophisticated insurance solutions to solve estate issues for high-net-worth individuals, families and foundations both domestically and internationally. Prior to joining TBG Nick interned at Northwestern and Mass Mutual. Nick was instrumental in helping TBG develop an audit tool used by professionals to help protect their fiduciary responsibility.

THE BURGESS GROUP
Prosperity with Purpose™

Presentation Overview

The Burgess Group (TBG), is an international firm specializing in wealth creation and wealth transfer strategies.

Their Premium finance platform is a strategy whereby a qualified borrower is provided with access to third-party financing to pay for large life insurance premiums. The insurance companies have constructed specific products for these financed plans to minimize outside collateral and maximize returns.

We focus on four distinct areas.

- Insurance
- Banks
- Interest Rate Management
- Trust Vehicle

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Solving the Talent Crisis

Speaker: Nicholas "Nick" Sinclair | TOA Global

About Speaker

Founder, TOA Global & Ab2 Institute of Accounting. Nick is an industry-leading speaker on accounting outsourcing. He founded TOA Global in 2013 to address the most common pain points accounting and bookkeeping firms face, including capacity, profitability, people, and time.

Now as founder of one of the fastest-growing accounting outsourcing companies in the world, he is an in-demand speaker who has helped more than 1,200 firms hire and train the best talent to form their global team.

TOA Global has grown under his original guidance as CEO to more than 2,800 team members serving more than 800 accounting and bookkeeping firms across Australia, New Zealand, the U.S., and Canada. He has since founded Ab2 Institute of Accounting, an accredited education institute that's 100% designed for the accounting industry, providing qualifications and short courses through customised, flexible, and innovative delivery format.

Presentation Overview

5 key area's that firms need to focus on:

1) The staffing model of the future

2) Your people strategy and why it's so important

3) How to become an employer that attracts top talent

4) How to not only attract but keep this talent.

5) How a global team can accelerate local careers and salaries.

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Presentation

Protecting Wealth when Disaster Strikes

Speaker: Benny Wright | Victory Claims Consulting

About Speaker

Benny Wright is the President of Victory Claims Consulting, a public insurance adjusting and property damage loss consulting firm. Benny has found a home for the last eight years in consumer advocacy through first party property insurance claims. He has surrounded himself with the best in the industry with an average tenure for the Victory team of roughly twenty years providing a wealth of industry knowledge to service clients in their time of need. Having experienced first hand the hurricanes in South Florida of the early 2000's, Benny lived the reality property owners face not having been educated within the claims process, and failing to enact the proper representation for such an occasion.

Presentation Overview

We'll be discussing what a Public Insurance Adjuster is and why it would be useful to your clients. We'll share a recent case study of how the impact of Victory's involvement changed the trajectory of the property owner's future with that portfolio. We'll highlight the crucial role the CPA firm played in the process working in tandem with Victory's team of experts, as well as showcasing the financial benefit that was gained by not only the property owner, but also the CPA firm.

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Presentation

Helping Small Businesses Scale with Credit and Financing

Speaker: Jerry Vaughn | J. Galt Finance Suite

About Speaker

He is passionate about helping main street business owners by helping them understand and leverage cash flow like the wall street corporations. They use their Business Finance Suite to help business owners build a strong EIN Business Credit Score to get all the capital they need without ever having to use their SSN or Personal Guarantees. He provides NEW strategies for today with skill development to eliminate debt, invest, and build wealth by understanding cash flow. He and his team work with YOU side by side to ensure your success! Their goal is to help businesses get their Financial House in order to achieve their Business Goals and Financial Freedom making the "American Dream" possible for all.

He lives with his wife, Richell, has two children, Courtney & Zach and their rescue dog, Mable. He is a foodie, enjoy's time with his family, loves the beach, and American Muscle Cars!

J.GALT

Presentation Overview

We are a solution to the #1 problem of business owners, cash flow. We help them with a consultative approach and specialized software to build a foundation to remove their personal risk and liability from their business. They build a diverse credit portfolio to access and leverage cash flow when they need it, manage and direct their cash flow to be more profitable and know the value of their business as an asset.

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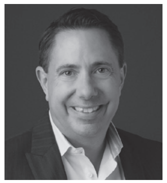
Presentation

Reviewing Unique Tax Mitigating Investment Strategies

Speaker: Vince Nelson | Arno Wealth



About Speaker

Vince Nelson, one of Arno Wealth's founding and managing partners, is a leading resource on wealth management and legacy bringing over 20 years of experience into action for others. He works with clientele consisting of an elite group of mission-oriented CEO's, business owners, professional athletes, and entrepreneurs to create comprehensive approaches to tax mitigating investment strategies, asset management, asset protection, and investment banking.

The concierge services offered combine a unique family office approach, in partnership with Engineered Tax Services linking the top tax professionals, attorneys, and accountants to address all your business and personal financial needs.

Presentation Overview

Vince will review tax mitigating investment strategies. We'll discuss solutions to add business sectors such as oil and gas, ESG, solar, film investments, exotic wildlife, and other unique investments that create endowment style diversified portfolios. Our out of the box approach is not something you'll have heard elsewhere. Come hear tax mitigating investment examples, and hear examples that will get you thinking in a different way.

ARNO WEALTH
BUILDING WEALTH, DREAMS AND LEGACY

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Presentation

Understanding New Cost Segregation Strategies to Maximize Your Benefit

Speaker: Mike D'Onofrio | Engineered Tax Services

About Speaker

As Managing Director with Engineered Tax Services (ETS), Michael works nationally with top CPA firms, savvy real estate investors, companies and individuals to help identify comprehensive engineering-based specialty Tax and Energy related solutions to maximize each situation. With a background in domestic and international finance, mergers & acquisitions, real estate development and renewable energy, Michael is a regular event speaker and educator on a national level regarding cost segregation, "green" building techniques and Federal, State and Local energy tax incentives. Michael obtained his MBA from Nova Southeastern University's Huizenga Graduate School of Business and Entrepreneurship in Ft. Lauderdale, FL after completing his undergraduate studies at John Carroll University in Cleveland, OH. Michael lives with his family in Charlotte, NC

Presentation Overview

New Cost Segregation Strategies to Comprehensively Maximize Federal Bonus Depreciation, CapEx Improvements, Dispositions as well as State and Local Transfer and Property Taxes

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Presentation

Looking at Volatility as a **Catalyst** to **Grow Your Business**

Speaker: Louie Rosalez | Avantax

About Speaker

Louie Rosalez is the President of Avantax Planning PartnersSM, a CPA-focused registered investment advisor. In his role, Louie focuses his efforts on leading the team and helping CPA firms across the nation develop successful wealth management practices. Specifically, he works closely with CPA firm leadership and accounting firm affiliates to manage the transition to advisory, visioning, accountability and more. Additionally, he serves as a senior leader to the wealth management division of Avantax, supporting the division by launching and growing advisory strategies across the organization.

Louie began his career at HK Financial Services (HKFS) in 1998. Over the years, he transitioned into multiple leadership roles, overseeing Marketing and New Business initiatives, the advisory team, as well as developing resources for firms to grow and successfully integrate planning into their firms. Throughout his tenure, Louie led the rapid growth of HKFS, all fueled by his passion to assist clients in defining and working to achieve their long-term financial goals.

Presentation Overview

Louie will explain why people should be in this business.

Avantax
Planning Partners℠

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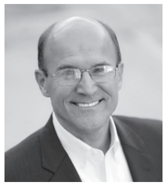
Presentation

Using Real Estate as a **Tax-Advantaged Alternative Investment Strategy**

Speaker: Karl Francetic | Realty Investor Capital, LLC



About Speaker

Karl Francetic oversees the origination, underwriting, structuring, and closing of Realty investor Capital's investments. Realty Investor Capital, LLC ("RealtyICap") is a real estate private equity, investment and advisory firm with a nationwide platform.

We offer investors alternative investment strategies in real estate while consistently delivering above-market risk-adjusted returns. RealtyICap focuses on comparatively higher-quality, low-risk real estate investments using institutional-grade underwriting and due diligence. Our investors include three billionaire families, several Single- and Multi-Family Offices (both international and domestic), professional athletes, ultra-high net worth investors and institutional capital partners from around the globe.

RealtyICap features two core platforms for investors - including short-term credit-tenant development projects and long-term/evergreen highly tax-advantaged value-add workforce housing properties.

REALTY INVESTOR
CAPITAL

Presentation Overview

Sharing alternative investment strategies in real estate designed for high-net-worth investors to achieve tax-advantaged, above-market risk-adjusted returns on comparatively low risk real estate investments. Accountants, registered investment advisors and lawyers recommend our firm - Realty Investor Capital - to their accredited investor clients to realize predictable returns in tax advantaged real estate investments.

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Presentation

Leverage Learning Opportunities to **Bolster Organizational Identity**

Speaker: Sara Huddleston | The Growth Partnership

About Speaker

Sara joined The Growth Partnership in February 2021 as the Director of Learning and Development after spending nearly 15 years serving as the Director of Human Resources for a public accounting firm. Prior to that role she held HR management roles in the fashion and education industries in New York City. With over 20 years of HR experience, Sara provides clients with support and guidance to deepen their understanding of the ever-evolving needs inherent in developing human capital.

Presentation Overview

"Know thyself" is an Ancient Greek aphorism, and it is more applicable now than ever. When you define and know your identity - whether at the individual, team or organizational level - you can align all of your actions with that identity. When you know yourself in the present sense and the aspirational sense, the future comes into focus and you can withstand the inevitable waves of life that threaten to capsize your ship. Knowing thyself does not happen automatically, however; it requires a high level of focus, accountability, and discipline.

The Growth Partnership offers a variety of programs that guide you through discovery, strategy development, and skill building to strengthen organizational identity and create greater cultural cohesiveness. During this session you will learn about the "Culture Check Up" and many of the workshops and training programs that help organizations achieve greater heights.

the growth
PARTNERSHIP

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Presentation

Uncovering the Power of R&D and Understanding Recent Updates

Speaker: Kim Lochridge | Engineered Tax Services

About Speaker

Kimberly Lochridge is Executive Vice President for Engineered Tax Services, Inc. (ETS), an industry-leading provider of specialty tax services in the United States. Kimberly possesses a powerful combination of real-world business management skills, with a fundamental understanding and practical application of tax codes as they relate to real estate, and energy efficiency incentives. This knowledge and experience has uniquely positioned her as a big-league tax expert for Fortune 500, high net worth individuals, ultra-high net worth individuals, single and multiple family offices, architects, engineers, and CPAs nationwide.

Prior to joining ETS, Ms. Lochridge has spent over a quarter of a century in entrepreneurship which had important roles within business, real estate and energy industries. Kim is also a frequent multi-national speaker in the tax, investment, private wealth, and family office spaces where she altruistically shares her expertise with others.

Presentation Overview

We will uncover the power of an R&D credit along with some case studies and determine who is the best candidate for a study.

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Presentation

Navigating the 1031 Exchange Life Cycle

Speaker: Michael Scherer | Engineered1031

About Speaker

Michael Scherer is a partner at RCX Capital Group, a registered broker-dealer. Michael is responsible for the design of replacement property alternatives for clients looking to facilitate 1031 transactions. Michael holds his FINRA series 7 and 63 licenses and is also a licensed real estate broker with B&E, a brokerage firm, specializing in net lease real estate and 1031 exchanges. Michael's experience allows him to take a product agnostic approach to the replacement property search, listening first to client needs, and offering clients access to both Delaware Statutory Trusts and fee simple alternatives (Triple Net Lease properties).

Prior to joining RCX Capital Group, LLC., Michael was a portfolio manager for Ensenia Wealth, LLC, an SEC registered investment advisor specializing in providing real estate and advisory services to Family Offices. Ensenia Wealth and its predecessor served as an integral part of Dan Goodwin's family office, founder of one of the nation's largest real estate organizations and 1031 exchange sponsors.

Presentation Overview

Michael will be covering Engineered 1031's advantages as an outsourced solution partner for CPA firms looking to help clients navigate through the 1031 process.

ETS1031

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Presentation

Relieving the Management Pains Felt by Today's CPA Firm Leaders

Speaker: Patrick "Pat" Morrell | Aiwyn

About Speaker

Pat Morrell is a software entrepreneur and co-founder of Aiwyn. At Aiwyn, he helps professional services firms implement solutions that speed up their cash flow, save valuable time for their partners, and deliver best-in-class experiences to their clients.

Aiwyn's Intelligence-Based Billing™ solution automates and improves time-consuming finance processes such as invoice prep, collections, and payments and liberates high-value partners and staff to focus on delivering value to clients. The solution also integrates and analyzes data from across firm systems to deliver actionable insights and predictive intel to firm leaders for better decision-making.

The benefits include large-scale time savings and productivity growth, improved cash flow, and revenue growth. With Aiwyn, clients enjoy a superior billing experience and firms reinforce their "trusted advisor" status.

Presentation Overview

Bringing an outsider's perspective to solving problems in the CPA profession, Pat and his co-founders have grown Aiwyn to work with over 60 of the fastest-growing firms in the country in under 2 years – Pat will share lessons learned and perspectives from other industries that can inform practical growth and problem-solving strategies for today's firm leaders.

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Presentation

Learning the Great Cybersecurity Acronym

Speaker: Shawn Long | viLogics

About Speaker

The founder and CEO of viLogics, Shawn Long, is an entrepreneur. Long has presided over a series of high-growth organizations for most of his professional life.

In 2008, viLogics was born to provide managed Services and VMWare-based IaaS hosting services to the enterprise space. Which led viLogics to its current status as a leading Multi-Cloud cybersecurity managed services organization. viLogics emphasizes proper cloud-to-endpoint data protection by offering a flagship product line called Total Secure Office or TSO.

Presentation Overview

We will explain all the acronyms and what they mean in today's cybersecurity landscape-- MDR, EDR, EPP, NGFW, SIEM, IR, SASE, and DLP.

Understanding what these services mean and how they work together to help protect all your assets is the only way to understand the value of these critical services fully.

viLogics
Any Cloud. Any Time. Any Where™

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Presentation

Exploring the Changes for **179D and 45L Incentives Related** to **Energy Efficient Buildings**

Speaker: Heidi Henderson | Engineered Tax Services

About Speaker

Heidi is the Executive Vice President of Engineered Tax Services (ETS) and holds a master's degree in accounting.

Her career has been spent in private accounting within the commercial real estate, development, and construction industries. This background allowed her to quickly adapt to the services offered by ETS as they relate to CPA's, business owners, and property investors nationally. She has spent the past 12 years consulting with CPA's and their clients on complex tax incentives and strategies to optimize their tax filing position.

Presentation Overview

Get a high-level overview of the extension and expansion of 179D deductions and 45L tax credits for EE buildings. These incentives apply to real estate owners, developers and the architects or engineers who design many projects, and these are left on the table far too often.

This presentation will provide the specific qualifications in simple bullet points so you can catch these benefits for your clients!

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Presentation

Defining Best Practices for WOTC Optimization

Speakers: Pickens Calhoun | Rockerbox

About Speakers

Pickens Calhoun is the Director of Processing. He's a tax credit expert helping clients navigate the ever changing provisions of both ERC and WOTC (Work Opportunity Tax Credit). Pickens has calculated more than $100M in credits from the ERC and helped manage WOTC programs in all fifty-states.

Presentation Overview

Work Opportunity Tax Credit (WOTC) optimization can help your clients improve cash flow by as much as 40%!

The WOTC experts from Rockerbox will walk attendees through some of our WOTC optimization best practices.

Rockerbox
MINING PROFITABILITY

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Presentation

Compelling Tax Mitigation: Immediate Tax Savings from Clients' Future Charitable Gifts

Speaker: Brad Gornto | iCLAT Solutions, LLC

About Speaker

Brad Gornto has practiced law throughout Florida for over 22 years in the areas of complex estate & charitable planning, business law, probate and trust administration, and income tax planning.

In addition to his law practice, Brad is the President and Founder of Effectual Giving, LLC & iCLAT Solutions, LLC, which are national consulting firms that assist families, charitable organizations, and allied professionals across the country in the design & actual implementation of effective charitable giving strategies, including charitable lead trusts (CLTs).

Brad earned his undergraduate degree (marketing) from Florida State University (1995), his law degree (J.D.) from the University of Florida College of Law (1998), and his LL.M In Taxation from the University of Miami School of Law (2000).

Presentation Overview

Learn how clients can set up a charitable giving strategy to generate immediate income tax savings.

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