

Tax Planning for Business Owners

Presented by:

William Caldwell
CEO
Caldwell & Companies

Friday, August 27, 2017

Tax Planning for Business Owners

Presented by:

William Caldwell
CEO
Caldwell & Companies

TAX PLANNING

HOW WELL DO YOU KNOW YOUR BUSINESS?



CALDWELL & COMPANIES
CERTIFIED PUBLIC ACCOUNTANTS

**PRESENTED BY: WILLIAM CALDWELL, CEO
CALDWELL & COMPANIES**

Teach&Travel
The Official Publication of SYTA

 **SYTA**
The Voice of Student & Youth Travel®

 **syta youth foundation**
Travel Changes Young Lives for Good

TAX MITIGATION STRATEGIES

- ✓ THE COMPANY STRUCTURE - IS THE RIGHT STRUCTURE IN PLACE?
- ✓ HOME OFFICE TAX DEDUCTION
- ✓ AUTO EXPENSES
- ✓ ADDING YOUR SPOUSE AS AN OFFICER OF THE COMPANY
- ✓ DEDUCTIONS FOR RETREATS AND VACATIONS
- ✓ EMPLOYMENT OF YOUR CHILDREN
- ✓ POTENTIAL NEED FOR ESTIMATED TAX PAYMENTS

ADDITIONAL CONSIDERATIONS FOR LARGER COMPANIES

- ✓ CAPTIVE INSURANCE PLANS
- ✓ STATE AND LOCAL EMPLOYMENT CREDITS
- ✓ FUNDED BUY/SELL AGREEMENTS
- ✓ KEY EMPLOYEE BENEFITS –
DISABILITY AND KEY MAN INSURANCE

THE ANNUAL BOARD MEETING

THE IRS REQUIRES THAT YOU HOLD AN ANNUAL
MEETING WITH YOUR
BOARD OF DIRECTORS.

WRITTEN DOCUMENTATION
(THE MINUTES) OF TAX PLANNING WILL
BULLET PROOF DEDUCTIONS.

Questions?



Conference Session Materials

- Conference session PowerPoints and materials will be posted on my.syta.org in the Resources/Education section on September 4th, 2017

SYTA Strategic Partners

strategic PARTNERS

