

Tax Update: What Advisors Should Know

Sarah Burgess, CPA

Biography:

Sarah is a graduate of the IU Kelly School of Business with a degree in Accounting (and finance, but she doesn't use it). She graduated with her MBA from Indiana Wesleyan University. Sarah has been a licensed CPA since 2009. Her primary practice is working with small and medium sized businesses and their owners to help them grow and ensure timely and accurate reporting. Sarah is a mom to two kiddos; teenager and tweenager! She has three fur children that are as spoiled as their human siblings. When she is not working, volunteering on boards, playing referee with the kids, she enjoys a good book and gardening.

Seminar Outline:

- Tax credits
 - Employee Retention Credit
 - Clean Energy Credits
 - Work Opportunity Credits
 - Retirement Plan Credits for Small Businesses
- Tax Changes
 - No big changes
 - Lots of inflation adjustments
 - Indiana Pass-Thru Entity
 - Indiana 529 Increase
 - Other States
- Best Practices
 - New Business Structure
 - Record Keeping