

2024 Tax Planning Strategies Course

Prerequisite:

Participants should have a basic understanding of individual taxation.

This will be an intermediate course.

Topics Covered:

- Qualified Charitable Distributions, (QCDs) Donor Advised Funds, and other charitable strategies
- Early retirement tax planning
- Planning for the 0% capital gains rate
- Backdoor Roths
- IRMMA
- Vermont property tax credit planning
- Retirement plans for self-employed and small business owners
- Tax planning for business transitions and the retirement of owners
- Planning for the possible expiration of certain provisions of the Tax Cuts and Jobs Act at the end of 2025

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PROVIDER



THE UNIVERSITY OF VERMONT
EXTENSION



TAX PLANNING STRATEGIES SEMINAR



Wednesday, October 23, 2024
Delta Hotels by Marriott
1117 Williston Road
South Burlington, VT 05403

TAX PLANNING SEMINAR go.uvm.edu/taxschool

Instructors

Lela McCaffrey, CPA, CFP

Lela is a Senior Wealth Advisor for Marble Trail Financial in Middlebury, Vt. Lela graduated from St. Michael's College and after working for a few years as a park ranger she moved into the role of business manager where she found her love for numbers. Lela went back to school, eventually becoming a licensed CPA in 2006. After many years working in public accounting she obtained the CFP designation in 2019 and recently joined Marble Trail Financial as a financial advisor.

John Scheer, CPA

John Scheer, CPA, is President and managing shareholder of Scheer & Hickey, P.C. in Colchester, Vt. John graduated from UMass-Amherst in 1977 and is a member of the American Institute of CPAs. John worked for three different accounting firms in Boston and Vermont before starting his own practice in 1992. His firm's focus is tax planning and preparation for closely held businesses and individuals. John has been teaching at the UVM Tax School for over ten years and has conducted classes for various business groups. John has served on various nonprofit boards and is currently treasurer of the Vermont Senior Games Association.

Jason Cadwell, CPA/PFS, CFP

Jason is the founding principal of Vermont Pure Financial, Inc., a financial planning and Vermont-Registered Investment Advisory firm in Shelburne, Vt. He specializes in providing financial planning services and investment advice on a fee-only basis. Jason attended the University of Vermont. He became a CPA in 1986 and achieved the PFS and CFP designations in 1996. After many years of working at Gallagher, Flynn & Company LLP, he opened his own financial planning company in 2004 where he currently works in the both the tax and financial planning fields.

Schedule (all times EST)

Wednesday, October 23, 2024

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|------------------------|----------|
| 7:30 – 8:00 a.m. | Check-in |
| 8:00 a.m. – 12:00 p.m. | Seminar |
| 12:00 – 12:45 p.m. | Lunch |
| 1:00 – 4:45 p.m. | Seminar |

Participants who attend the entire session will receive 8 hours of Continuing Professional Education (CPE) credit.

Location

Delta Hotels by Marriott

1117 Williston Road
South Burlington, VT 05403

Space is limited so please sign up early.

Hotel Information: go.uvm.edu/delta-hotel-btv

Registration

| | |
|--------|---|
| Early: | \$410, registered or postmarked by Sep. 20 |
| Late: | \$465, registered or postmarked after Sep. 21 |

Cancellation Policy & Fees

Except medical, family or military emergency

| | |
|-------------------------|-------|
| On or before October 8: | \$100 |
| After October 8: | \$150 |

Contact

Program & Facilities: Peggy Manahan, 802-656-7620
Credits & Certificates: Lisa Flinn, 802-656-7607

REGISTRATION

Register for the 2024 Tax Planning Strategies online or by mail.

Option 1: Online

<https://go.uvm.edu/2024taxplanning>

Visa and MasterCard accepted. We are unable to accept cash payments with online registration.

Option 2: By Mail

Return this registration form (one per participant) with check payable to "University of Vermont" to:

UVM Extension Tax School
Attn: Peggy Manahan
278 South Main St., Suite 2
St. Albans, VT 05478-1866

| | |
|----------------------|-------|
| Name | _____ |
| Organization | _____ |
| Address | _____ |
| City/State/Zip | _____ |
| Phone | _____ |
| Email | _____ |
| PTIN | _____ |
| Dietary Restrictions | _____ |

Registration Fee

Postmarked by September 20 \$410

Postmarked after September 21 \$465

Total Enclosed \$ _____