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Tax Planning and Legal Tax Reduction Strategies

December 10, 2025 • 1:00 pm - 2:40 pm ET

Agenda

Introduction to Tax Planning
- Why Tax Planning Is so Important for All Ages
- Covering the 3 Major Documents for Individuals
- Why Tax Planning Is Important for Businesses

Reducing Business Taxes
- Using Tax Credits
- Offering Employee Plans
- Different Depreciation Strategies

Reducing Individual Taxes
- Maximizing Employer Plans
- Maximizing Retirement Plans
- Tax Benefits of Sole Proprietors

Use of Trust for Tax Efficiency
- Review of Different Types of Trusts

Working With the IRS
- How to Avoid Audits
- How to Respond to IRS Notices
- Due Diligence and Practice Management

Learning Objectives

After attending this live webinar, you will be able to:
- explain to their clients the steps needed to be taken to ensure efficient and practical tax planning.
- discuss the options available for business tax planning, and implementing tax efficient policies, procedures and programs.
- identify which tax options will be best suited their business and individual clients.
- recognize potential tax planning and tax reductions problems for their business and individual clients.

Learn the latest tax code changes and practical planning strategies so you can confidently guide clients, optimize their current and future tax positions, and navigate IRS processes with greater clarity and effectiveness.

Each year, the tax code evolves through Congressional legislation, requiring time and further analysis by the IRS and the professional community to clarify legislative intent. These changes are implemented through IRS pronouncements and, ultimately, U.S. Tax Court decisions.

Given this continual evolution, it is imperative for financial executives, financial planning professionals, and tax practitioners to stay informed and provide accurate, strategic guidance to their business and individual clients. Ongoing education and awareness of best practices are essential to developing effective financial and tax strategies.

This presentation will equip professionals with valuable, practical insights to help clients address current tax needs and prepare for future planning. Attendees will gain proven strategies for the 2025 tax filing year and beyond, along with practical guidance for effectively managing interactions with the IRS.

To register, visit www.lorman.com/ID411974 or call 866-352-9539 • Tuition: $219 • Live Webinar ID: 411974

Printable registration form available upon request.

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Faculty

Leonard Steinberg, EA

• Enrolled Agent and founder of Steinberg Enterprises, LLC, specializing in tax representation, problem resolution, and tax planning for individuals, businesses, nonprofits, estates, and trusts
• Represents clients before the IRS and state tax authorities, including audits, appeals, installment agreements, offers in compromise, and trust fund recovery cases
• Former appointee to the IRS Taxpayer Advocacy Panel and long-time member of the FASB Small Business Advisory Committee
• Has testified before the U.S. House of Representatives on federal tax matters
• National speaker and educator for organizations including the IRS, Paychex, Jewish Vocational Services, and Lorman Education Services
• Experienced instructor in accounting, taxation, internal controls, fraud prevention, and nonprofit management at multiple colleges and professional programs
• Holds advanced credentials including an MBA in International Business and Finance, certificates in financial planning and accounting, and extensive IRS continuing education
• Active member and leader in professional tax organizations, including the National Association of Enrolled Agents and the National Tax Practice Institute

Continuing Education Credit

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*For detailed credit information, visit **www.lorman.com/ID411974** or call **866-352-9540.**
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General Information: Includes free downloadable manual with attendance. This live webinar may be recorded by Lorman Education. If you need special accommodations, please contact us two weeks in advance of the program. Lorman Education Services is not approved to offer self-study CPE credit for accountants; therefore, no CPE will be given for this program if ordered as a self-study package. Cancellations: If you wish to cancel any unviewed product, live webinar or seminar, cancellations must be received within seventy-two (72) hours of your purchase to receive a full refund. For paid purchases of a single live webinar or seminar, you may transfer your registration to an alternate event or send a substitute attendee to the event in your place. Notice of a transfer or substitution must be provided to Lorman in advance of the originally purchased event. If you cannot attend your live webinar or seminar, you may substitute your registration amount for a recording, if available, at no additional charge.