



**Live seminar includes:**

- Spiral Handouts
- Continental Breakfast and Lunch
- Refreshments
- Free Parking



Meet Your Instructor:  
Larry Pon, EA

# Update for 2023 Tax Return

**SF BAY CHAPTER**

## THINGS YOU'LL LEARN

Information you can use in the REAL WORLD!

### Part 1

- Individual Update and Tax Planning
- New energy credits
- Electric vehicle credits
- SECURE 2.0 changes taking effect in 2024

### Part 2

- Business Update and Tax Planning
- Employee Retention Credit IRS audits and IRS guidance
- Most recent IRS guidance and tax cases

### Part 3

- Corporate Transparency Act
- New beneficial ownership reporting requirements
- How to avoid penalties
- Will affect many business clients

### Part 4

- California Tax Update and Planning
- CA's new penalty abatement
- CA conformity/nonconformity
- CA income tax for non-CA clients
- Most recent FTB guidance and tax cases

*Providing the most recent tax legislation to better serve your Clients.*

**REGISTER NOW!**

**EARLY BIRD SPECIAL**

Members - \$239.00 until Nov. 20th

Non-Members - \$269.00 until Nov. 20th

Members - \$259.00 after Nov. 20th

Non-Members - \$289.00 after Nov. 20th

**Saturday, December 09, 2023**

**Double Tree Hotel**  
835 Airport Blvd.  
Burlingame, CA 94010

Registration opens  
at 7:30AM

Live Seminar  
8:30AM to 4:30PM