OFFICIAL COURSE CATALOG

TAX PLANNING STRATEGIES™

LEARN HOW TO KEEP MORE OF YOUR HARD-EARNED MONEY

WHAT?

Classroom Instruction on Professional Tax Minimization Strategies

WHERE?

DFW-Area: UT Arlington, TCC Northeast, TCC Northwest, and Tarleton State Ft. Worth

WHEN?

Multiple Dates Offered in the Spring and Fall Semesters: Details Inside

REGISTER TO LEARN:

- How to Minimize Your Tax Bill in Retirement to Keep More of Your Hard-Earned Money
- Tax-Saving Tips to Maximize Returns on Your Investment Portfolio
- Roth Conversions and Timing for Tax-Free Growth
- Estate and Gift Tax Strategies to Reduce Taxes on Wealth Transfers
- How to Get the Most Tax Advantages from Your Small Business or Self-Employment

"This course gave me invaluable information to create my personal tax plan. I've already applied the strategies to reduce my taxable income and boost my savings. Great investment!"

LANCE R., HURST

TUITION: $69 PER PERSON, TEXTBOOKS INCLUDED

TARLETON STATE UNIVERSITY

UTA Continuing Education
DIVISION FOR ENTERPRISE DEVELOPMENT

Tarrant County College
NORTHEAST & NORTHWEST CAMPUSES

TRUSTED EDUCATION FOR A SECURE FINANCIAL FUTURE

WHY ATTEND THIS CLASS?

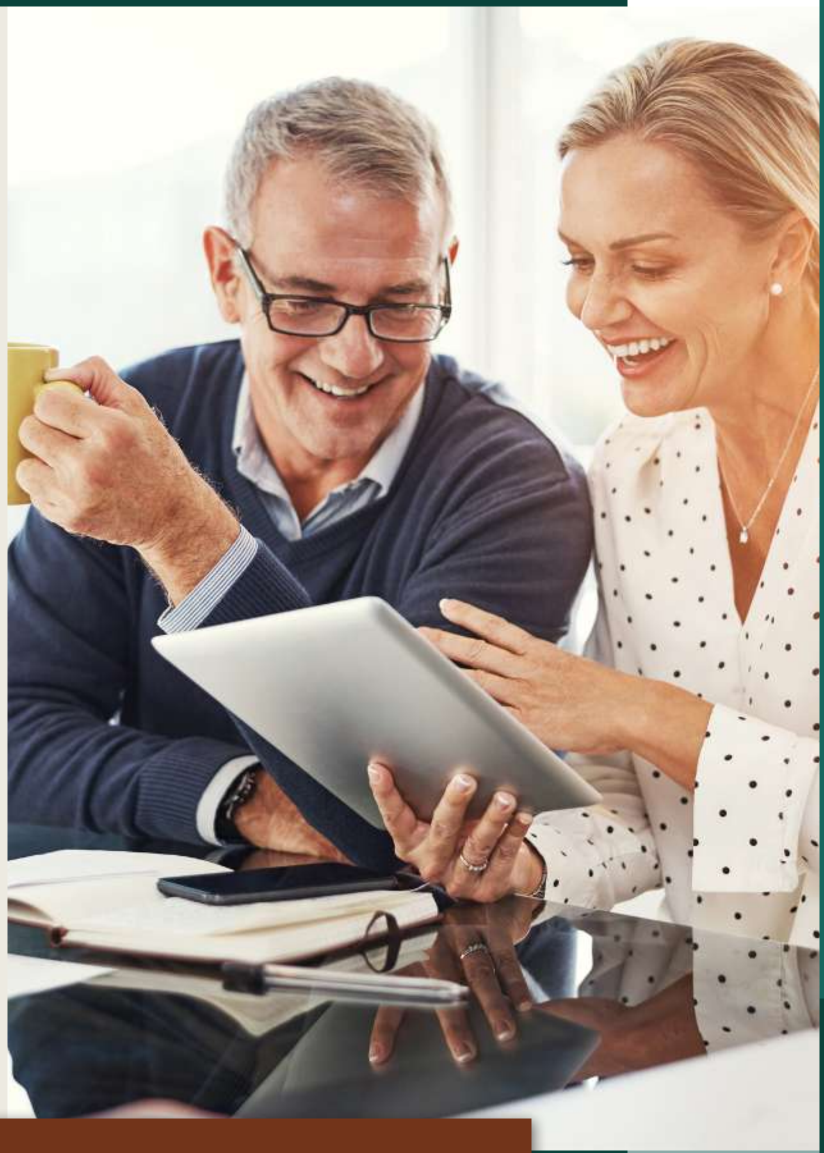
Smart tax planning is one of the most powerful ways to preserve and grow wealth. But without the right tools, you could lose thousands each year to avoidable taxes. New laws, hidden liabilities, and missed opportunities can quietly erode your income and savings.

In this class, gain the insider knowledge most people never receive. You'll uncover eye-opening tax-saving opportunities, learn how to avoid costly mistakes, and walk away with strategies you can apply immediately to lower your tax bill now and in retirement.

WHO SHOULD ATTEND?

This course is designed for anyone who wants to pay less in taxes and boost financial security. Whether you're preparing for retirement, managing investments, or simply looking to improve your financial plan, you'll learn how to make smarter, more tax-efficient decisions.

Most importantly, you'll leave with a personalized roadmap for how to lower taxes, grow wealth, and create a strong financial future for you and your family.



THIS COURSE INCLUDES ACCESS TO THE FOLLOWING INTERACTIVE RESOURCES:

- Personal Tax Snapshot Worksheet
- Tax Deduction & Credit Checklist
- Investment Tax Efficiency Scorecard
- Retirement Account Strategy Planner
- Family Wealth Transfer Planning Worksheet
- Charitable Giving Strategy Worksheet
- Real Estate Tax Strategy Checklist
- Business Owner Tax Strategy Worksheet
- Top 10 Tax Planning Mistakes to Avoid
- Your Personalized Tax Planning Roadmap™
- Advisor Discussion Checklist

LETTER FROM A SATISFIED STUDENT

Dear Josh,

I just wanted to take a moment to thank you for teaching such an informative tax planning course. Your expertise and passion for the subject made a huge difference in my understanding of my finances, and I feel so much more confident about my financial future and retirement plan after taking the class.

Before this course, I was overwhelmed by all the tax strategies I'd heard about but never fully understood. You broke everything down in such a simple, practical way that it finally clicked for me. The lessons on tax-efficient withdrawals and Roth conversions were particularly eye-opening, and I've already started applying them to my retirement plan.

What I appreciated most was how approachable you made the learning process. Your patience and willingness to answer every question made the sessions so valuable, and I could tell you genuinely cared about helping each of us succeed. Thanks to your guidance, I now have a clear strategy to reduce my taxes and make my savings last longer.

Being able to take home the textbook has also helped me tremendously. I refer back to it anytime I need answers during tax season and beyond. The best part was the private consultation offered after the class. I was able to receive a customized plan for my unique situation. It's such a relief to feel in control of my finances and know that I'm making smarter decisions.

Thank you again for sharing your knowledge and for making such a positive impact on my financial future. I'm so grateful for all I've learned from you!

All the best,
Karen & Mike from Fort Worth, TX

WHAT STUDENTS ARE SAYING ABOUT THIS COURSE

"I had no clue how much I was overpaying in taxes until I took this class. The instructor explained each and every complex topic - like Roth conversions and tax-loss harvesting - in such an understandable and relatable way. Highly recommend for everyone!"

JOHN M., BENBROOK

"This course completely changed how I look at my retirement plan! I now understand how to use smart strategies to withdraw from my accounts in order to save thousands in taxes. I couldn't believe it! This class is a must for anyone nearing retirement."

SARAH T., KELLER

TAX PLANNING STRATEGIES™ COURSE PREVIEW

TAXES 101: INTRODUCTION
This foundational chapter introduces the strategic mindset behind proactive tax planning. You'll learn how to align your financial goals with proven tax techniques and understand the basics of the U.S. tax system—empowering you to start your journey with clarity and confidence.

REDUCE YOUR PERSONAL TAX BILL
Discover the often-overlooked personal tax strategies that can significantly reduce your tax bill. From maximizing deductions and credits to leveraging health accounts and business structures, this chapter arms you with tactics that deliver immediate and long-term savings.

INVESTMENT TAX ADVANTAGES
Explore how savvy investors use tax-efficient strategies to grow wealth while minimizing tax exposure. You'll learn how to optimize investment timing, choose the right account types, and turn investment losses into powerful tax advantages.

RETIREMENT TAX STRATEGIES
Retirement planning isn't just about saving. It's about saving smart. This chapter reveals how to strategically use retirement accounts, convert Roth IRAs, and leverage HSAs to create a tax-efficient income stream in your later years.

ESTATE PLANNING & TAXES
Estate planning goes far beyond writing a will. Learn how to reduce estate taxes, transfer wealth tax-efficiently, and use gifting strategies and trusts to protect your legacy and empower the next generation.

SAVE TAXES WHILE GIVING BACK
Upon retirement, you will be tasked with making crucial financial decisions about how your retirement plan will play out. In most cases, these critical decisions are irreversible and will affect the rest of your life. In this section, we reveal the strategies around how to take your hard-earned money out of various retirement plans to help achieve your financial goals.

PROFITING WITH PROPERTIES
Whether you own your home or a portfolio of rentals, real estate offers unique tax-saving opportunities. Discover how to sell, reinvest, and manage property in ways that defer or eliminate taxes and build generational wealth.

BIG BREAKS WITH BUSINESSES
Entrepreneurs have access to some of the most valuable tax strategies available. Learn how to optimize your business structure, maximize retirement plans, and reduce taxes on business income and future exits.

MISTAKES AND TAX TRAPS
Even seasoned taxpayers make avoidable errors. Learn common mistakes and tax pitfalls, such as missed deadlines and misunderstood rules, and gives you the tools to steer clear of costly mistakes that could derail your entire strategy.

BUILD YOUR TAX PLAN ROADMAP
Tie it all together with a step-by-step guide to implementing your personalized tax plan. You'll gather key documents, finalize your strategy, and leave with a clear, confident roadmap to maximize your tax savings year after year.

SYLLABUS: OFFICIAL COURSE OUTLINE

I. TAX PLANNING INTRODUCTION
- The Reason for Strategic Tax Planning
- Income Taxes 101: Win the Game
- Your Tax-Smart Journey Begins Here

II. PERSONAL TAX STRATEGIES
- Deductions & Credits
- Itemize Like a Pro: The "Bunching" Technique
- HSA vs. FSA: Wealth-Building Healthcare Hack
- Turn Your Side Hustle into a Tax Shelter

III. TAX-EFFICIENT INVESTING
- How the Wealthy Cut Taxes with Investments
- Capital Gains Mastery: Timing is Everything
- Decoded: Pre-Tax, Post-Tax, & Roth
- Harvesting Losses: Turning Loss into Gain

IV. TAX-SAVVY RETIREMENT INCOME
- Traditional vs. Roth; Who Wins?
- Use HSAs as a Stealth Retirement Account
- Roth Conversions: When to Convert?

V. ESTATE PLANNING TAX STRATEGIES
- Tax-Free Gifting: Max Annual Exemptions
- Shrink Your Estate with Irrevocable Trusts
- 529 Plans: Smart Way to Generational Wealth

VI. CHARITABLE GIVING TAX TOOLS
- Qualified Charitable Distributions:
- Donor-Advised Funds
- Charitable Tools for Windfall Events

VII. REAL ESTATE TAX OPPORTUNITIES
- Tax-Free Home Sales
- Rental Properties: The Ultimate Tax Shelter
- Opportunity Zones & 1031 Exchanges

VIII. BUSINESS TAX ADVANTAGES
- Solo 401(k): Self-Employed Loophole
- Unlock the 20% QBI Deduction
- Rollover, Reinvest, Reduce: Exit Strategies

IX. MISTAKES AND TAX TRAPS
- Unreported IRA Contributions = IRS Trouble
- Basis Errors: Silent Killer of Returns
- Missed RMDs: Penalties You Can Prevent
- The IRMAA Cliff: Dodge Medicare Tax Spike
- Social Security Tax Torpedo: How to Avoid It

IX. CONCLUSION & NEXT STEPS
- The Documents That Drive Your Tax Plan
- Create Your Personalized Tax Planning Roadmap™

DID YOU KNOW?
Only about 2% of respondents to a tax literacy poll were found to be "proficient" in tax knowledge. *

**Source: Taxfoundation.org*

THIS COURSE INCLUDES EVERYTHING YOU NEED TO LEARN

TRUE CLASSROOM EXPERIENCE

Tax Planning Strategies™ is designed to be both enjoyable and deeply informative. Led by a CERTIFIED FINANCIAL PLANNER™ and fiduciary expert, the material is filled with practical insights and real case studies. The setting encourages open discussion, allowing you to ask questions and fully engage in the learning experience.

COMPREHENSIVE EDUCATION

Unlike typical financial seminars that only cover one topic, this program helps you understand the “big picture”. You’ll explore all the elements of tax planning and how they work together so you can keep more of your hard-earned money. The class is purely educational, and no financial products are discussed, promoted, or sold.

HANDS-ON LEARNING GUIDE

You’ll receive a course textbook created by your instructor filled with examples and interactive content to help understand each concept with ease. Written in clear, accessible language, this book is yours to keep and will serve as a reliable home reference long after class is over.

ONE-ON-ONE EXPERT SUPPORT

For personal questions or a deeper look into tax planning for your unique situation, you’ll have the option to meet one-on-one with your instructor after the course at no additional cost. This private session is offered exclusively to students and is completely optional, but is not required.

MEET YOUR INSTRUCTORS

JOSH W. STRITTMATTER, CFP® CRC®

Josh has been teaching tax planning and several other financial subjects at DFW-area colleges and universities since 2010. His passion is education, and he believes knowledge and financial literacy are important for each and every person at all stages of life.

KELLY BUCHFINK, CFP®

Kelly has been in the financial industry since 2001 and enjoys applying her experience and expertise to helping others. She finds teaching extremely rewarding, and hopes that her students gain knowledge and inspiration to help them meet their financial goals.

IN PRAISE OF TAX PLANNING STRATEGIES™

“This class was a wake-up call in the best way. Seeing how much unnecessary tax I would have paid over the next 20 years brought me to my knees. No one ever explained this to me before. The guidance I received will save me tens of thousands of dollars, and I finally feel like my hard-earned money is staying where it belongs... with me.”

CRAIG N., ARLINGTON

“I can honestly say this course changed my retirement future. I had no idea taxes could drain so much of my savings if I wasn’t strategic. Learning these strategies was emotional; I realized how much money I could have lost without ever knowing why. Now I feel more sure than ever that my savings will last longer.”

CARLA G., SOUTHLAKE

“I walked into this class thinking taxes were just an unavoidable part of retirement. I had NO idea how much money was accidentally slipping away each year. The strategies I learned opened my eyes... and honestly, it was emotional realizing how much I could have saved earlier. Now I feel in control, and I know exactly how to prevent future loss.”

HELEN B., GRAPEVINE

“I’ve always been careful with my finances, but this class showed me gaps that I didn’t even know existed. When the instructor demonstrated how much money I could save by adjusting my withdrawals and planning smarter, I felt both shocked and relieved. I’m so grateful I found this class before making costly mistakes I couldn’t undo.”

KURT S., BURLESON

Click the button below to view available class dates and to begin registration.

CLICK TO REGISTER

Can’t access the button above? Visit: financialclass.org/tax-dates to sign up.

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REGISTER TODAY TO:

- Create a Personalized Tax Plan to Maximize Savings
- Discover Retirement Withdrawal Strategies to Boost Income
- Learn How to Minimize Taxes on your Investment Portfolio
- Utilize Real Estate Investments to Create Massive Tax Savings
- Get Expert Insights on Estate and Gift Tax Strategies
- Use your Small Business or Self-Employment as the Ultimate Tax Saving Strategy

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