



Business Entity Selection 101



\$119 Member - \$129 Non-Member

Tuesday, July 16, 2024, 3:30 PM - 7:30 PM

Santa Ana Elks Lodge

1751 South Lyon Street

Santa Ana, CA, 92705

Join us for a 4 hour CE presentation on Business Entity Selection. Owning a business can be an exciting and rewarding dream! With TikTok and YouTube giving our clients all their answers, we need to educate them correctly on the structures available and what fits their needs. This course will walk you through four business structures: sole proprietorship, partnership, corporations, and single-member LLCs. We will highlight common missteps and how to help our clients avoid those obstacles. We will present a case study to show how each structure can affect an individual's tax return. Bring your pencil and questions to this workshop.

IRS: 4 hours

CTEC: 4 hours California Taxes

CA Bar: 3.50 hours Taxation Law

2:30 PM - Board Meeting

3:30 PM - Session 1 starts

4:40 PM - Social and Networking

5:00 PM - Session 2 starts with dinner (Taco Buffet)

7:30 PM - Session Ends

Register through the CSEA website and register early so we have an accurate count for dinner. Registration at the door fee is \$129 member and \$139 for nonmember.

[Register Now](#)

Kim Mellinger-Cheng, EA, graduated from CSUF in 2008 with a degree in Finance. She then went to work in the accounting world. In 2013, after passing the EA exam, she started her practice working with small business owners. Kim enjoys working with small business owners and specializes with S-Corps. She is the President of OCCSEA.

Joe Davidson is an Enrolled Agent with over 10 years of Tax Preparation experience. After graduating from Concordia University Irvine in 1998 with two Bachelor's degrees, one in Business Management and the other in Business Accounting, Joe began his career in the Tax and Financial industries. In 2009, Joe founded Tax Advice Guys, offering clients the highest quality of customer service, and assistance in all of their tax needs, including representation, correspondence and of course, preparation and planning. He specializes in Small Businesses and Clergy returns.

Louis Avalos, EA, is an expert in all areas of taxation, including corporate, estate, individual, partnership and federal, local and state taxes.

Lori B. Gailey MST, MGFE, EA has been an IRS Enrolled Agent since 1997. She has a Master of Science in Taxation from William Howard Taft University. She did her undergraduate work in accounting at Rick's College, University of Utah, and Southern

Utah University. She has been preparing tax returns for thirty-eight years ranging from very basic tax returns to complex personal and entity returns.

Nancy Navarro-Walker has been practicing accounting since 2006, preparing tax returns since 2009, and in 2013, became an Enrolled Agent. Having worked for small business owners and as a small business owner herself, she knows firsthand the challenges that come with running a business.



31726 Rancho Viejo St Ste 215, San Juan Capistrano, United States

Powered by [Squarespace](#)

[Unsubscribe](#)

