PROFESSIONAL SPEAKING & EDUCATION

Paul Hogenson

Tax Mitigation Speaker & Educator

PRACTICAL EDUCATION FOR PROFESSIONALS

Paul helps tax, real estate and financial professionals understand complex planning structures, ask better questions and recognize risks and limitations. Programs are tailored to the audience, format and learning goals.

TEACHING AND SPEAKING EXPERIENCE

Paul has taught dozens of 1031 continuing-education classes for professional audiences, including real estate agents, brokers and CPAs. He has led several lunch-and-learns for CPAs and real estate professionals, participated in panels on these subjects and been invited to speak on webinars.

FLAGSHIP PROGRAM

Advanced Tax Mitigation Strategies Every CPA Should Know

A connected view of 1031 exchanges, DST replacement property and Opportunity Zones, with attention to applicability, transaction constraints, investment risks and advisor coordination. Optional modules and the program scope are agreed with the host.

PARTICIPANT TAKEAWAYS

Recognize planning questions before a transaction.
Distinguish the scope of different strategies.
Identify investment risks and limitations.
Coordinate questions across the advisory team.

SPEAKING TOPICS

1031 exchanges

Delaware Statutory Trusts (DSTs)

721 vs DST vs TIC

Opportunity Zones 2.0

Cost segregation and bonus depreciation

IRA-to-Roth conversions

Oil and gas investments

Advanced tax mitigation

AUDIENCES

CPA associations and accounting firms; real estate and business brokers; tax attorneys and law firms; qualified intermediaries; financial professionals; professional associations.

FORMATS AND PLANNING

Conference sessions, panels, lunch-and-learns, webinars and firm training. CPE/CE eligibility, sponsorship, hours and requirements are confirmed with the hosting organization. Booking does not automatically guarantee credit.

DISCUSS YOUR EVENT

paulhogenson.com/book-paul/
480-914-1031

Educational programs do not provide individualized tax, legal or investment advice. Investments involve risk, including possible loss of principal.
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