

Paul Hogenson

National Tax Mitigation Speaker for CPAs

PRACTICAL EDUCATION FOR PROFESSIONALS

Paul Hogenson is a national tax-mitigation speaker and educator for CPAs and other professionals, and Founder and CEO of DST Investment Advisors and Opportunity Zone Advisors.

Speaking experience includes a Houston CPA event, Phoenix real estate/QI sessions, CPA and commercial broker lunch-and-learns, and dinner presentations on 1031 exchanges and DST investing.

FLAGSHIP PROGRAM

Advanced Tax Mitigation Strategies Every CPA Should Know

A connected framework for discussing 1031 exchanges, DST replacement property and Opportunity Zones, with attention to applicability, transaction constraints, investment risks and advisor coordination.

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.

FOCUSED SPEAKING TOPICS

1031 Exchanges

What Every Advisor Should Know

Delaware Statutory Trusts

DSTs and the 1031 Exchange: What Tax Professionals Need to Know

Opportunity Zones 2.0

What Every CPA Should Know

AUDIENCES

CPA associations and firms, tax attorneys, commercial real estate brokers, business brokers, qualified intermediaries, financial professionals and professional associations.

FORMATS AND PLANNING

Conference sessions, CPE/CE programs, lunch-and-learns, webinars, panels and private firm training.

Suggested flagship format: 60-90 minutes. Scope, level, prerequisites and delivery are coordinated with the host. Credit hours, sponsorship and eligibility are confirmed by the hosting organization.

BOOK PAUL TO SPEAK

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