We'll get you there.

2023 Tax Insights

Andrew Desiderio, CPA

CPAs | CONSULTANTS | WEALTHADVISORS

© 2023 CliftonLarsonAllen LLP. CLA (CliftonLarsonAllen LLP) is an independent network member of CLA Global. See <u>CLAglobal.com/disclaimer</u>. Investment advisory services are offered through CliftonLarsonAllen Wealth Advisors, LLC, an SEC-registered investment advisor.



The information herein has been provided by CliftonLarsonAllen LLP for general information purposes only. The presentation and related materials, if any, do not implicate any client, advisory, fiduciary, or professional relationship between you and CliftonLarsonAllen LLP and neither CliftonLarsonAllen LLP nor any other person or entity is, in connection with the presentation and/or materials, engaged in rendering auditing, accounting, tax, legal, medical, investment, advisory, consulting, or any other professional service or advice. Neither the presentation nor the materials, if any, should be considered a substitute for your independent investigation and your sound technical business judgment. You or your entity, if applicable, should consult with a professional advisor familiar with your particular factual situation for advice or service concerning any specific matters.

CliftonLarsonAllen LLP is not licensed to practice law, nor does it practice law. The presentation and materials, if any, are for general guidance purposes and not a substitute for compliance obligations. The presentation and/or materials may not be applicable to, or suitable for, your specific circumstances or needs, and may require consultation with counsel, consultants, or advisors if any action is to be contemplated. You should contact your CliftonLarsonAllen LLP or other professional prior to taking any action based upon the information in the presentation or materials provided. CliftonLarsonAllen LLP assumes no obligation to inform you of any changes in laws or other factors that could affect the information contained herein.

How should I be looking at 2023 & beyond?



© 2023 CliftonLarsonAllen LLP. CLA (CliftonLarsonAllen LLP) is an independent network member of CLA Global. See <u>CLAglobal.com/disclaimer</u>. Investment advisory services are offered through CliftonLarsonAllen Wealth Advisors, LLC, an SEC-registered investment advisor.



Tax Insights – 2022 Tax Year

- Employee Retention Tax Credits
- Year-End Tax Planning for Businesses
- Individual Tax Planning





Looking Ahead

- Expiration of Tax Provisions
- Estate Planning and Wealth Transfer
- Leveraging Expanded Services







Andrew Desiderio, CPA Principal andrew.desiderio@CLAconnect.com CLA exists to create opportunities for our clients, our people, and our communities.

Sign up for our blog to receive timely insights: https://blogs.claconnect.com/





CLAconnect.com

CPAs | CONSULTANTS | WEALTH ADVISORS

© 2023 CliftonLarsonAllen LLP. CLA (CliftonLarsonAllen LLP) is an independent network member of CLA Global. See <u>CLAglobal.com/disclaimer</u>. Investment a dvisory services are offered through CliftonLarsonAllen Wealth Advisors, LLC, an SEC-registered investment advisor.