

Structured Tax Planning Calendar

January	February	March	April	May	June
<i>Maximize Deductions</i>	<i>Legal Entity Optimization</i>	<i>Retirement Planning</i>	<i>Insurance / Other</i>	<i>Legal Loopholes</i>	<i>International</i>
Home Office Travel Expenses Meal Categories Hiring Children & Grandparents Maximize Depreciation Health Care Strategies Fringe Benefits Accountable Plans Medical Reimbursement Plan Home Administrative Office	Schedule C to S-Corp S-Corp to C-Corp Analysis of Distributions	Profit-sharing Retirement Plan Traditional 401(k) Roth 401(k) Cash Balance Plan Self-Directed Retirement Funds Defined Benefit Plans 412(e)(3) Plan	Captive Insurance Cost Remediation	Augusta Loophole QEAAP	Puerto Rico Act 20&22 U.S. Virgin Islands EDC Program

July	August	September	October	November	December
<i>Niche Strategies</i>	<i>Advanced Strategies</i>	<i>Exits & Capital Gains</i>	<i>Gift & Estate Planning</i>	<i>Tax Cuts & Jobs Act</i>	<i>Asset Protection</i>
1031 Exchange Cost Segregation Passive Real Estate Losses FICA Tip Credit Research & Development Tax Credit Self Employed Health Insurance Premium Credit Work Opportunity Tax Credit	Deferred Compensation Tax Loss Harvesting (Investments) Conservation Easements Cooperatives Family Office Management Company Revenue Stream Bifurcation Charitable LLCs Freeze Transactions with GRATs and IDGTs	Installment Sales Deferred Gains - DST QSBS Elections ESOP / ESOT ESOP's	Charitable Remainder Trusts Family Trusts	199A C-Corp Tax Rate Opportunity Zone Credit Favorable Depreciation Rules Non-Grantor Trusts and Section 199A Non-Grantor Trusts and Section 1202 C-Corps and the "GILTI" Tax C-Corps and FDII	Family Limited Liability Company ("FLLC") Exempt Asset Planning with ERISA Plans Exempt Asset Planning with Private Placement Life Insurance ("PPLI") Exempt Asset Planning with Private Placement Variable Annuities ("PPVA") Offshore Asset Protect Protection Trust ("OAPT")

Securities offered through Kestra Investment Services, LLC (Kestra IS), member FINRA/SIPC. Investment advisory services offered through Kestra Advisory Services, LLC (Kestra AS), an affiliate of Kestra IS. Offit Advisors is not affiliated with Kestra IS or Kestra AS. Neither Kestra IS nor Kestra AS provide tax or legal advice.