



Retire SMART Announces Educational Workshop: 'Exit Planning & Taxes for Entrepreneurs'

OMAHA, NE, UNITED STATES, April 15, 2025 /EINPresswire.com/ -- [Retire SMART](#), a retirement and financial education firm based in Omaha, will host a complimentary educational workshop titled "Exit Planning & Taxes for Entrepreneurs" on Saturday, April 26, 2025, at 8:00 AM at its main office located at:

Retire SMART Headquarters
13815 FNB Parkway, Suite 400
Omaha, NE 68154

Breakfast will be provided for registered attendees.

This workshop is designed to provide general education to business owners about strategies they may consider when addressing [tax planning](#) and business succession goals. It is not intended to offer specific tax, legal, or investment advice.

Workshop Focus

The session will be led by David Brooks CIST[™], CEPA[®], founder and CEO of Retire SMART, who will share insights based on his experience as a business owner. The workshop will also include educational segments presented by licensed professionals, Evan Marshall (CPA) and Mike Schudel CFP[®], CLU, ChFC, CFS[™], CAS[™], a financial advisor.

Attendees will receive an overview of the SMART planning model, which addresses core concepts relevant to exit and tax planning:

S – Shifting Income

Discussion on potential income-shifting strategies, including the Augusta Rule, hiring family members, and charitable structures such as Charitable Remainder Trusts and Qualified Opportunity Zones.

M – Maximizing Deductions

Overview of tax deductions that may be available to business owners, including donor-advised funds, depreciation methods, and charitable contributions.

A – Analysis of Entity Structure

Educational discussion about common business entities (LLCs, S-Corps, C-Corps, Partnerships) and how structure may affect taxation and self-employment liabilities.

R – Retirement and Succession

Review of retirement plans that may be established by business owners, such as 401(k)s, defined benefit plans, and Employee Stock Ownership Plans (ESOPs). Succession concepts will also be discussed in a general framework.

T – Tax Credits

Overview of available tax credits, including the Retirement Plan Startup Credit, Work Opportunity Tax Credit, and credits related to research and energy efficiency.

Disclaimer: The content presented during this workshop is for general educational purposes only and should not be construed as personalized financial, investment, tax, or legal advice. Attendees are encouraged to consult with their own advisors before making any financial decisions.

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