

3rd Annual Tax Planning and Growth Forum

Hosted by: **Bassett & Associates, P.A.**

November 11 – 12, 2009

CST Classrooms, One Copley Parkway, Morrisville, NC 27560

November 11th

8am – 10am - QuickBooks Tricks & Tips – Intermediate & Advanced

The Bassett & Associates Team

- Tweaking QuickBooks So That it Works for You
- Setting up Items, Customers and Vendors. Paying Bills and Printing Checks
- Reconciling Bank Accounts, Entering Credit Card Charges, Recording Owner's Draws, Using Memorized Transactions, Creating Basic Reports and more!
- Customizing QuickBooks to Manage Your Business By the Numbers
- QuickBooks Security and IRS Audit Issues (advanced)
- Job Costing, Class Tracking, Subcontractors, Sales Tax, Online Banking, Creating Budgets, Creating Cash Flow Forecasts, Creating Customized Reports and more!

10am – 12noon - Increasing Cash Flow with the Five Profit Accelerators

Kevin Bassett, CPA and Asa Beavers

Join us for our latest material in our Managing Your Business by the Numbers™ series.

- The 10 Secrets of Cash Flow
- The 5 Profit Accelerators
- Strategies to Boost Cash Flow in the Next 60 Days

1pm – 3pm - 5 Time Mastery Techniques Guaranteed to Help Any Business Create 1 Extra Day Per Week to Work ON Your Business, Not In Your Business – David Finkel

Surveys consistently show that the number one challenge most business owners face is a lack of time. Email, employee challenges, client fires, deadlines dominate most business owner's days.

- Learn how David is able to run 2 multi-million dollar businesses, sit on the boards of 3 others, and still work less than 35 hours per week.
- A breakthrough time mastery system to fundamentally change how you look at your time
- 3 strategies to creating an extra 8 hours per week—guaranteed!

3pm to 5pm – Tax Update and Strategies

The Bassett & Associates Team

- 2009 Tax Update featuring the latest tax laws of 2009 (including the Health Care Bill)
- The Do's and Don'ts of Using Vehicles in Your Business
- Finding Hidden Tax Deductions for Your Business
- The Hottest Audit Issues in 2009
- Advanced Strategies for the New Tax Laws

November 12th – 1 Day Business Owner Bootcamp: The Short Course to Building a Multi-Million Dollar Business

David Finkel

Join Wall Street Journal and Business Week bestselling business author David Finkel for a concentrated day long workshop. A Concrete Roadmap Laying Out the Entire Lifecycle of Your Business from Launch to Exit.

- How to build a business, not a job
- How to **magnify the value of your company** so you can sell for millions!
- How to use technology and outsourced solutions to **cost-effectively scale your company!**
- How to **build intelligent controls** that allow you to safely step back from the day-to-day operations and focus on the bigger picture of growing your business to the next level!
- The **6 most damaging business owner behaviors!**
- The **5 core pillars** of every great business (and how to determine which pillars you are ignoring!)
- The 3 obstacles that stop most business owners from getting to the next level!

(Special Bonus Session for Bassett & Associates Clients!)

- The Seven Secrets to Mastermind Your Way to Millions
- 21 Advanced Deal Structuring Strategies
- 35 Hidden Assets You Can Leverage In Your Business
- 14 Advanced Negotiating Secrets
- The Five Languages of Financial Fluency

About our presenters:

The Bassett & Associates Team

Bassett & Associates, P.A. is a full-service CPA firm that provides innovative financial and tax strategies for entrepreneurs and investors. Most of the firm's clients are owners of privately-held emerging and middle market companies that are seeking financial independence. Using a proprietary process called The Virtual CFO Advantage™, Bassett & Associates helps their clients manage their business by the numbers, increase cash flow, minimize taxes and build wealth.

Asa Beavers

Asa is the founder of Redline Business Solutions. During his diverse business career spanning 25 years Asa has been a business owner, sales executive, sales director, marketing director, business manager, team trainer and executive leader. This combination of experiences has made Asa an extremely effective coach in helping business owners realize their own dreams of building and growing successful, profitable businesses. Asa offers clients a wealth of expertise in marketing, advertising, sales, organizational leadership, team building, and change management, as well as helping businesses in the areas of recruitment, customer service, systems and business development.

David Finkel

Ex-Olympic-level athlete turned business multi-millionaire, David is one of the nation's most respected business thinkers. A *Wall Street Journal* and *Business Week* best selling author of over 40 business and financial books and courses, including the wildly successful, *The Maui Millionaires for Business*, his how-to business and financial articles have appeared in over 4,000 periodicals across the United States. His company, Maui Mastermind, is a community of successful entrepreneurs helping business owners take their businesses to the next level. They give business owners a concrete roadmap that lays out the entire lifecycle of their businesses from launch to exit. He and the other Maui Advisors have personally built, scaled and sold over \$2 billion of businesses. What's more important, over the past 15 years his 100,000 clients and Maui community members have gone on to build over \$1 billion of businesses for themselves.

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Registrant Information:

Name (Please Print)

Daytime Phone Number

Street Address

Email (will not be shared)

City, State, ZIP

Company Name

____ **November 11th Half-day Option**
(Pick any 2 classes)

\$150.00
Early Bird Discount* \$119.00

____ **November 11th Full-day Option**
(All classes included)

\$250.00
Early Bird Discount* \$199.00

(8:00 am – 10:00 am)

____ QuickBooks – Intermediate & Advanced

(10:00 am – 12:00 noon)

____ Increasing Cash Flow & Profits

(1:00 pm – 3:00 pm)

____ Time Mastery Techniques

(3:00 pm – 5:00 pm)

____ Tax Update & Strategies

____ **November 12th Business Owners Bootcamp with David Finkel**

\$250.00

(8:30 am – 4:30pm)

Early Bird Discount* \$99.00

*** Early Bird Discount Available if we receive your registration by October 23rd.**

Payment Information:

TOTAL FEES _____

Check Enclosed Visa Master Card AmEx

Credit Card Number

Exp. Date

Security Code

Name as it appears on the card [please print]

Title

Signature

Date

I authorize BASSETT & ASSOCIATES, P.A. to charge the amount above.

FAX FORM TO (919) 232-2554 or mail to:

Bassett & Associates, P.A.
3701 Lake Boone Trail, Suite 201
Raleigh, NC 27607