

# € TRAINING

Advanced Strategies in Aggressive Tax  
Planning and Management

2 - 13 December 2024  
Madrid (Spain)





# Advanced Strategies in Aggressive Tax Planning and Management

REF: TR1927 DATE: 2 - 13 December 2024 Venue: Madrid (Spain) - Fee: 7950 Euro

## Introduction:

This training program aids professionals in navigating the complexities of tax legislation. Within the context of current tax laws and settings, this program provides useful tax planning techniques. By the end of the program, participants will have ways to increase their short-term tax deductions and decrease their long-term tax exposure. .

## Program Objectives:

At the end of this program, the participants will learn about:

- Learn how to file taxes and prepare tax returns.
- Become knowledgeable about the various approaches and strategies used in tax planning.
- Use various tax planning methods to distinguish between tax avoidance, avoidance of tax, and tax planning, and to identify which ones are appropriate in which circumstances.
- Recognize why tax management, control, and planning are all equally important parts of the process.
- Reading case studies and taking part in discussions with taxation experts will help you get useful information.
- Consider different tactics to influence tax rules to your advantage.

## Targeted Audience

- Accountants and tax consultants.
- Experts in general taxation.
- Tax experts working for advising firms and Tax experts in the commercial and trade sectors.
- Government employees.
- Internal tax managers or directors.
- Tax enforcement agencies.
- People with an interest in financial planning.
- Small- and medium-sized businesses.
- Business secretaries.

## Program Outline:

### Unit 1:

#### Tax Fundamentals:

- Understanding Tax Structure and Laws.
- Overview of Income Tax Law.
- Importance of Different Slab Rates.
- Introduction to Tax Definitions and Filing.
- Steps in Tax Planning.

### Unit 2:

#### Tax System Operations:

- Operation of the Individual Tax System.
- Utilizing the Tax System for Businesses.
- Determining Taxable Income.
- Maximizing Deductions and Fiscal Credits.

### Unit 3:

#### Tax Planning Strategies:

- Introduction to Tax Planning and Its Significance.
- Strategies for Real Estate, Securities, Retirement Accounts, and Small Businesses.

### Unit 4:

#### Tax Reform and Exemptions:

- Impulse and Impact of Tax Reform.
- Understanding Tax Exemptions and Planning Overview.
- Difference Between Tax Planning and Management.
- Goals, Categories, and Areas of Tax Planning.

## Unit 5:

### Income Taxation:

- Agriculture Income and Exemptions Overview.
- Taxation of Household Property Income.
- Taxation of Other Sources of Income.
- Clubbing of Income and Capital Gains.

## Unit 6:

### Tax Saving Strategies:

- Maximizing Deductions and Legal Entity Optimization.
- Retirement and Insurance Planning.
- Advanced Tax Saving Strategies.

## Unit 7:

### Tax Planning Business Model:

- Charging for Tax Planning Services.
- Defining Key Areas of Opportunity and Lead Generation.
- Service Delivery Model and Pricing.

## Unit 8:

### Building a Tax Planning Business:

- Planning, Preparation, and Implementation Strategies.
- Scaling A Profitable Tax Planning Business.

## Unit 9:

### Tax Planning and Profitable Business:

- Understanding Tax Planning from a Business Perspective.
- Scaling and Growing a Profitable Tax Planning Business.

- Leveraging Career History and Pricing Strategies.

## Unit 10:

### Deductions and Tax Planning:

- Planning for Taxes and Utilizing Deductions.
- Adjusting Deductions Based on Changing Tax Laws.
- Considerations for Cost and Market-specific Tactics.