



Generate Cash Flow for Your Clients From the CARES Act (Non PPP Related) (Webinar)

Using Tax Reform and Real Estate to Generate Additional Cash Flow to Address COVID-19

June 16, 2020 ☐ 10:00am - 10:45am

The PPP stream of cash flow for your clients is coming to an end. It is even more important during this time for bankers to remain a Trusted Advisor to their clients. The CARES Act Legislation surrounding taxes can help you do this. The CARES Act allows clients to increase cash flow because they own commercial property or have paid for tenant improvements through a reduction in taxes or a potential refund in the current tax cycle. If you or your clients own or lease commercial or residential income property, this will be critical information for you to hear.

Three specific topics will be covered, using an NOL (net operating loss) in a loss carryback, using a Cost Segregation Study to create a NOL, and Qualified Improvement Property that qualifies for Bonus Depreciation. The CARES Act allows owners to get money back from the US Treasury from a cash refund when they need it most or at a minimum reduce taxes in the current cycle. These topics are not related to the SBA loan process. This is an additional viable source of cash flow.

Webinar Speakers:



Warren Dazzio serves as Executive Vice President of CSSI. As a natural leader, Warren brings ethics and integrity into every aspect of his life and work. Warren has an MBA from LSU. Warren brings a team mentality to CSSI in supporting our extensive sales channels and helping to develop new products and services to bring to the organization. He has extensive knowledge of tax laws and consults with building owners and development firms to reduce or defer their taxable income. He travels the US providing educational webinars on tax law and solutions for accounting professionals, building owners, wealth managers and real estate professionals. Warren is a native of Baton Rouge where he lives with his wife and three daughters.



Jeanne Moreland Trum is one of CSSI's top Account Executives, collaborating with clients and their tax professionals nationally from Boston to Austin and beyond. Her relatability and personal philosophy of treating people the way she would like to be treated has served her well in business, earning her the 2018 CSSI "Break Out" award. Jeanne is a Baton Rouge native, mother of 2 grown men and a brand new grandmother. She has been a committee member for the Bust Breast Cancer event for 7 years through Women's Hospital. Jeanne is a "foodie", dabbles in watercolors, learning other languages and enjoying family and friends.

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