



Key Tax Saving Strategies

- Have your practice's *most recent* Dental-Specific CPA-reviewed balance sheet and profit and loss (need a referral to a dental CPA? [Send](#) us an email)
- Meet with your Dental CPA to review your 2024 tax year estimates
 - ➔ That's the guide to letting you see what you can look at implementing this year
- Review your 401k plan to help reduce your taxes.
 - ➔ Are you putting in the maximum for this year? \$23,000. + \$7,500 if age 50 +
 - ➔ Have you included your spouse as an employee?
 - ➔ Have a 2024 Profit Sharing Calculation done by your Third-Party Administrator (TPA) and share with your CPA
 - ➔ If you don't have a 401k or need a review? [Reach out](#), and we can help you implement one before the end of the year or get one started for 2025 NOW!
- Review investments for losses and charitable donations
- Review the [Secure Act 2.0](#) and your possible benefits.
- [Schedule your FREE initial consultation](#), and we can partner with you and your CPA to help reduce your taxes!



E2E Financial, LLC

Ever to Excel

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NOTE: We say CPA. Make sure your accountant is a CPA. There is no substitute!

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