



Key Steps to Make 2025 Your Best Financial Year Yet

- Get dental-specific CPA-reviewed balance sheet and profit and loss financial statements **monthly**.
- Plan with your dental CPA to review your 2025 taxes quarterly
 - ➔ Earlier in the year you plan, easier it is to avoid surprises
- Review your 401k plan to help reduce your taxes.
 - ➔ Are you deferring the maximum for 2025? Up to \$23,500. Plus \$7,500 catch-up if age 50 to 59. If age 60 to 63, can add up to an additional \$11,250
 - ➔ A ROTH 401k deferral may be a better option than pre-tax deferral. Reach out to us to find out.
 - ➔ If you don't have a 401k or need a review, [reach out](#), and we can help you implement one or improve what you have!
- Spouse work in your practice? Review including your spouse as an employee
- Consider increasing W2 pay and tax withholding to avoid having to make quarterly tax payments
- 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!

NOTE: We say CPA. Make sure your accountant is a CPA. There is no substitute! Need a dental CPA referral? [Reach out](#).