

# Speaking Topics:

Brian Nuttall, CPA, J.D. Founder & Owner of Elevate CPA Group

## Expert Tax Advice for RIA Firms: The Five Lessons to Thrive

We all know that tax is inevitable and typically, the bigger your success the bigger your tax bill! Brian is a firm believer in working smarter and not harder when it comes to your RIA firm's tax. In this presentation for financial and investment professionals, Brian outlines five valuable lessons that can be implemented for substantial benefit. The lessons include:

- The ins and outs of investment interest expense to help your high-net-worth clients
- Making sense of the SECURE act for your financial planning firm
- How to avoid a surprise tax bill for your clients that receive employee bonuses
- Why the structure of your RIA firm matters when it comes to tax
- Understanding the short- and long-term complications of forgivable notes and breakaway loans

## Elevate Your RIA Firm Transition Process

Buying or selling an RIA firm is a complicated, stressful and exciting process! The fine details of a successful RIA purchase or sale go well beyond dollars and cents. Elevate CPA Group has helped several RIA firms successfully complete the process. In this presentation, the Elevate team steers you clear of pitfalls and towards success! The presentation includes:

### What You Need to Know About Preparing to Sell Your RIA Firm

- Setting expectations
- Keeping top talent
- Business valuation

### What You Need to Know About Preparing to Buy an RIA Firm

- Setting expectations
- Know your numbers
- Highest and best use of you

## The Secret Sauce: How to Successfully Grow Your RIA Firm from Industry Experts

There is a reason you get your eyes checked by an eye doctor and not a dentist. It's the same reason that you trust industry experts with your RIA firms financials, tax planning, KPI setting and more – they know what they are doing! In this presentation, Elevate CPA Group provides a series of case studies to illustrate how they have taken RIA firms hunger for growth and turned it into clear actionable steps that lead to success.



### Brian Nuttall, CPA, J.D.

*Founder and Owner*

Brian is one of the founding managers of Elevate and a specialist in ownership issues. In addition to tax and accounting expertise, he brings a legal understanding to the table, giving his clients critical perspective in the face of complicated challenges.

When it comes to helping RIA firms grow, the knowledge Brian has amassed throughout his career allows him to advise on a range of solutions. He's someone who looks out for his clients and isn't afraid to speak truth when needed—yet is beloved for his easy laugh.

Brian grew up in Boulder and graduated from the University of Colorado Business School in 1993. He earned his law degree and passed the bar exam in 1996. Brian has served on several charitable boards over the years and is currently working with the The Robert and Kathleen Dobkin Intuitive Foundation. He has previously served on the boards of Dental Aid, Volunteer Connection of Boulder County, Boulder Preparatory High School, and Colorado Society of CPAs.

Although Brian likes to golf, he primarily enjoys being with his family. Together, the Nuttall family loves to travel as much as possible, ideally to a place where they can see plenty of wildlife and connect with true locals.

To Request Brian  
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