

Navigating Year-End Planning and New Tax Regulations

Never Too Early, But Is It Too Late?

Presented by Brett LeMmon, CPA, MA; Earned
(SDDS Vendor Member)

Wednesday, September 17, 2025 • No CEU

6:00pm • Registration | 6:30–8:30pm • Class & Light Meal

SDDS Classroom | 2035 Hurley Way, Suite 200 • Sacramento

No matter where you are in your career — whether you're just starting out or have an established practice — this workshop is designed to help you navigate year-end financial planning opportunities. Join us as we explore the latest tax regulations, key strategies for optimizing tax positions, and practical steps to close out 2025 on a strong financial note.

Course Objectives:

- **Latest Tax Regulations:** Stay informed about the most recent changes and how they impact your financial planning.
- **Tax Optimization Strategies:** Discover key methods to help optimize your tax positions and minimize liabilities.
- **Retirement Planning:** Plan for a secure and comfortable retirement with tailored strategies from Earned Wealth.
- **Wealth Management:** Explore effective wealth management techniques to grow and protect your assets.
- **Year-End Financial Steps:** Learn practical actions to close 2025 on a strong financial note and set a solid foundation for the new year.

COMPLIMENTARY TO SDDS MEMBERS

Brett joined Earned in 2015. He holds a master's degree in accountancy from Southern Utah University and is a Registered Investment Advisor. Prior to joining Earned, Brett worked for the Utah State Tax Commission. He is very passionate about helping clients save money, find inventive ways to be more tax efficient, and build wealth creatively and efficiently. Brett spends his free time with his wife and three boys. He loves mountain biking, hiking, and most anything else outdoors.

September 2025 BF Registration

Who's coming? _____
(include designation)

Telephone: _____ Email: _____

SDDS Member's Name: _____ Designation: _____

	Staff Member of SDDS Member / ADA Member	Non-member
Regular Registration:	\$49	\$99

Payment Method: ☐ Check ☐ Credit Card Total Amount: \$ _____

Cardholder Name: _____ Card #: _____ Exp. Date: _____

CVV: _____ Billing Address: _____

Please return form to: Sacramento District Dental Society: 2035 Hurley Wy, Ste 200 • Sacramento, CA 95825 • Phone: 916.446.1227 • Fax: 916.447.3818 • Email: sdds@sdds.org • www.sdds.org
The Sacramento District Dental Society is an approved CE provider through the Dental Board of California (RP2168) • This course meets the Dental Board of California's requirements for units of CE listed.

No show policy for complimentary events

We are committed to providing high-quality courses and events for our SDDS members. To ensure fairness and availability to all attendees (and for the purpose of event planning, space and food), we ask that if you need to cancel attendance at a free event, please provide a minimum of 72 hours' notice. If you do not attend a free event for which you have registered and fail to provide the necessary notice, a \$25 charge will be billed. By registering for this course/event, I agree to the terms and conditions of this event. Visit sdds.org for full details.



Sacramento District Dental Society
Locally Approved PACE Program
Provider for FAGD/MAGD credit.
Approval does not imply acceptance by
any regulatory authority or AGD endorsement.
04-01-24 to 03-31-27
Provider ID# 2168