

Small Business Owners Get an Edge on Tax Savings!

Professional Planning Associates, Inc. helps small business owners establish effective tax-slashing tools for increased financial success.

What Does Professional Planning Associates (PPA) Do?

PPA is a unique consulting firm that helps small business owners save money with innovative tax-reduction strategies. PPA has helped many clients save millions of dollars in taxes. With the input of several tax attorneys and CPAs, PPA has built a process for evaluating the tax efficiency of privately owned corporations.

Who is Steve Burgess?

Steve Burgess is the President of Professional Planning Associates, Inc. in San Diego. Burgess is a regular on KCEO 600am, and he teaches a tax-slashing strategies course for the Learning Annex. Burgess created PPA after discovering that most businesses owners were looking for a deeper level of advice than most tax advisors are able to provide.

With over 15 years of consulting experience in all aspects of business ownership, Burgess is an integral part of PPA and is proud of its accomplishments in saving professionals thousands of dollars in taxes and expenses.

How is PPA Different from Other Accounting Firms?

To start with PPA is not focused on preparing tax returns. According to Burgess, "PPA is like a second opinion. Just like when you are sick and visit your general practitioner who does a diagnosis and then refers you to a specialist for the area of pain. We are specialists in the world of corporate tax planning. In fact, we get many of our clients as referrals from accounting firms."



"Our average client saves an extra 35% in taxes after working with PPA. Everything is by the book."

Why Choose PPA?

Running a small business requires a lot of time and decision making. Most business owners need help in specialized areas such as tax planning. Many business owners hire a CPA, but are disappointed with the outcome.

Burgess comments, "Many clients come to me after failed expectations from other sources. Most clients have first gone to their CPA or attorney expecting proactive help in running their business. Nine times out of ten this doesn't happen." Burgess understands that business owners do not have time to run a business and be an expert in tax planning or legal matters. That is exactly where PPA's services start.

PPA helps its clients save thousands of dollars in taxes each year.

Burgess states, "Our average client saves an extra 35% in taxes after working with PPA."

Who is PPA's Typical Client?

Any privately held corporation with 1 to 50 employees. PPA covers all industries from entertainment to construction. Burgess says that most of PPA's clients are extremely successful and have come to him looking for fresh tax-planning ideas. According to Burgess it's a matter of knowing what tax-planning tools are available and using the right one for the right client. "Our client base is pretty diverse. We have worked with actors, contractors, athletes, builders, and many more. We continually educate ourselves on tax strategies that are viable for any given client." He continues to say, "You can play within the rules and still come out ahead. You just have to know the rules, and we know them better than most."

For more information, please call PPA or visit their website today!



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