



POWERED BY NADIA.CPA

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# S Corp Masterclass

## *Open House*

SPRING 2026 • OPEN HOUSE SESSION

*Hosted by Nadia Rodriguez, CPA, CTC*



## MEET YOUR INSTRUCTOR

# Nadia Rodriguez

CPA • CTC • Founder, Tax Training Academy

- Certified Public Accountant and Certified Tax Coach
- Founder of Tax Training Academy
- Tax educator, mentor, and keynote speaker
- Passionate about helping tax pros grow in confidence and clarity

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IN THIS SESSION

# What We'll Cover *Today.*

01

**Why S Corps?**

*The tax pros who get the most value*

02

**Quick S Corp check**

*A short self-assessment, no pressure*

03

**Inside the program**

*A 10-week curriculum walk-through*

04

**Weekly rhythm**

*How each week actually works*

05

**Options**

*Three ways to join the Masterclass*

06

**Live Q&A**

*30 minutes reserved for your questions*

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# Why Are S Corps So Popular?

# Why Are S Corps So *Popular*?

## The "Tax Savings" Entity

*Often the primary reason clients explore this structure*

## High Client Demand

*Tax professionals receive inquiries about them constantly*

## Strategic Planning Opportunities

*Creating powerful mechanisms for wealth and tax optimization*

## Industry-Standard Structure

*One of the most frequently discussed and utilized business entities*

# Free Resource: S Corp Tax Savings Calculator

INTERACTIVE TOOL - TAX YEAR 2025

## S Corp Tax Savings Calculator

Compare self-employment tax on a sole proprietorship versus an S corporation election. Slide, see, save.

Business net profit **\$150,000**

Reasonable officer salary **\$60,000**

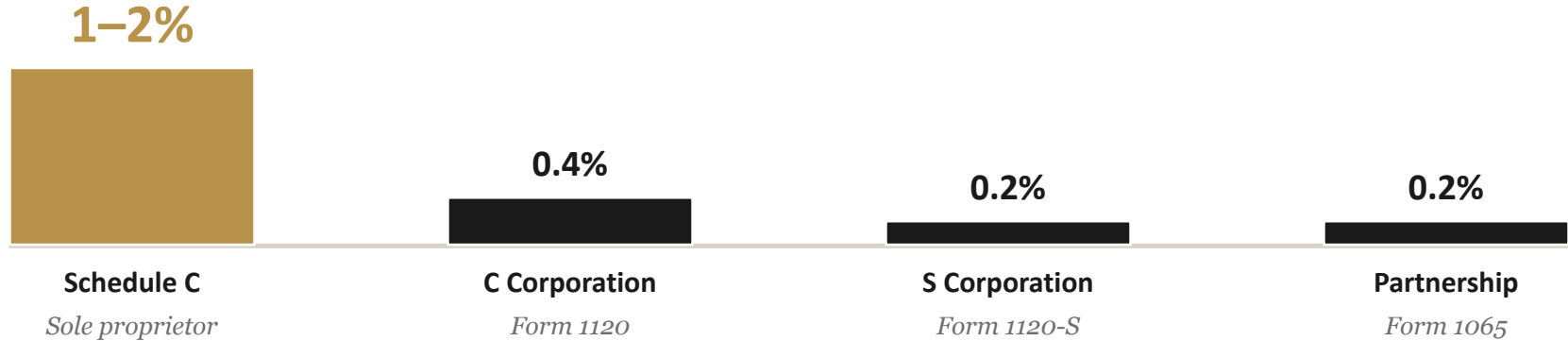
SOLE PROP	
<b>Schedule C</b>	
Net profit	\$150,000
SE tax base (92.35%)	\$138,525
SE tax rate	15.3%
SE tax owed	\$21,194
<b>Total SE tax</b>	<b>\$21,194</b>

S CORPORATION	SAVINGS
<b>Form 1120-S</b>	
Reasonable salary	\$60,000
Payroll tax on salary	\$9,180
Distribution (remaining)	\$90,000
SE tax on distribution	\$0
<b>Total payroll tax</b>	<b>\$9,180</b>

WHY STRUCTURE MATTERS

# The Audit *Reality.*

*Sole proprietors are audited 5–10× more often than S corps.*



*Source: IRS Data Book 2023 — business return audit rates by entity type.*

# What does this *mean for you?*

## Beyond Tax Savings

The decision is bigger than just the numbers on a return.

## Holistic Impact

S Corps affect payroll, distributions, basis, and compliance.

## Client Readiness

Knowing when it fits—and more importantly, when it doesn't.

## Strategic Advisory

This is the point where standard compliance turns into advisory.

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SELF-CHECK

# Quick S Corp

## *Knowledge Check.*

*No need to answer out loud — just see where you stand.*

01

Is an S Corporation a legal entity or a tax election?

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SELF-CHECK

# Quick S Corp

## *Knowledge Check*

*No need to answer out loud — just see where you stand.*

02

Can a loss from an S Corp K-1 offset other income on a Form 1040?

# Quick S Corp

## *Knowledge Check*

*No need to answer out loud — just see where you stand.*

03

Two shareholders, each is a 50% owner. For the year, one shareholder took total distributions of \$20,000, the other shareholder only took distributions of \$5,000. Is this allowed for an S Corp?

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OUR WHY

THE STORY BEHIND

# Why I built *this Masterclass.*

*Built for tax pros who want real confidence,  
not more theory.*

## More than theory

Tax pros need practical, real-client application, not just textbooks.

## Strategy meets compliance

S Corps require both. We teach them together, not in isolation.

## Structure builds confidence

Repetition, support, and clear guidance are how skills stick.

## S Corps made practical

Complex rules translated into the way you actually work.

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IS THIS FOR YOU?

# Who This Program *is Built For.*

*I*

## **Expanding Practices**

Tax pros ready to add S Corp clients to their services

*II*

## **Growing Confidence**

Preparers already doing S Corps who want stronger mastery

*III*

## **Seeking Structure**

Professionals who want support, templates, and a proven path

*IV*

## **The Future Expert**

Tax pros ready to become the go-to S Corp voice in their area

# Inside the Masterclass, *we go deeper.*

*Every question on the last slide maps to a full module inside the program.*

**Entity Choice**

**Elections & Eligibility**

**Reasonable Compensation**

**Basis & Losses**

**Distributions & Compliance**

**Real-World Application**

# 10 Weeks. *4 Phases.*

*One complete transformation.*

*I*

**FOUNDATIONS**

*Weeks 1 – 3*

S Corp fundamentals, eligibility,  
and entity choice

*II*

**FORMATION**

*Weeks 4 – 5*

Elections, filings, and 1120-S  
reporting essentials

*III*

**OPERATIONS**

*Weeks 6 – 8*

Compensation, basis, losses, and  
advanced rules

*IV*

**STRATEGY**

*Weeks 9 – 10*

Terminations, accountable plans,  
and final returns

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BY THE END, THE SKILLS YOU GAIN

# What You *Will Master.*



S Corp foundations and entity choice



Eligibility rules and elections



Forms 2553 and 1120-S reporting



Shareholder-employee compensation



Stock and debt basis tracking



Loss limitations and distributions



Accountable plans and final return issues



Strategy and practical application

# More Than *Just a Course.*

**01**

## **Practical & Beginner-Friendly**

Concepts explained clearly, no matter your starting point

**02**

## **10 Weeks of Structure**

A guided path from foundations to advanced strategy

**03**

## **Live Support & Q&A**

Power Hours and real-time problem solving

**04**

## **Community Learning**

Group chat with other tax pros walking the same path

**05**

## **Tools & Templates**

Resources you'll use in your practice right away

**06**

## **Mentorship from Nadia**

Direct guidance from someone who has been there



POWERED BY NADIA.CPA

# S Corp Masterclass

*Program Overview & Course Guide*

**A 10 WEEK PROGRAM • 2026 EDITION CURRICULUM**

Presented by Nadia Rodriguez, CPA, CTC  
FOUNDER · TAX TRAINING ACADEMY

Turn the page →

## PROGRAM OVERVIEW

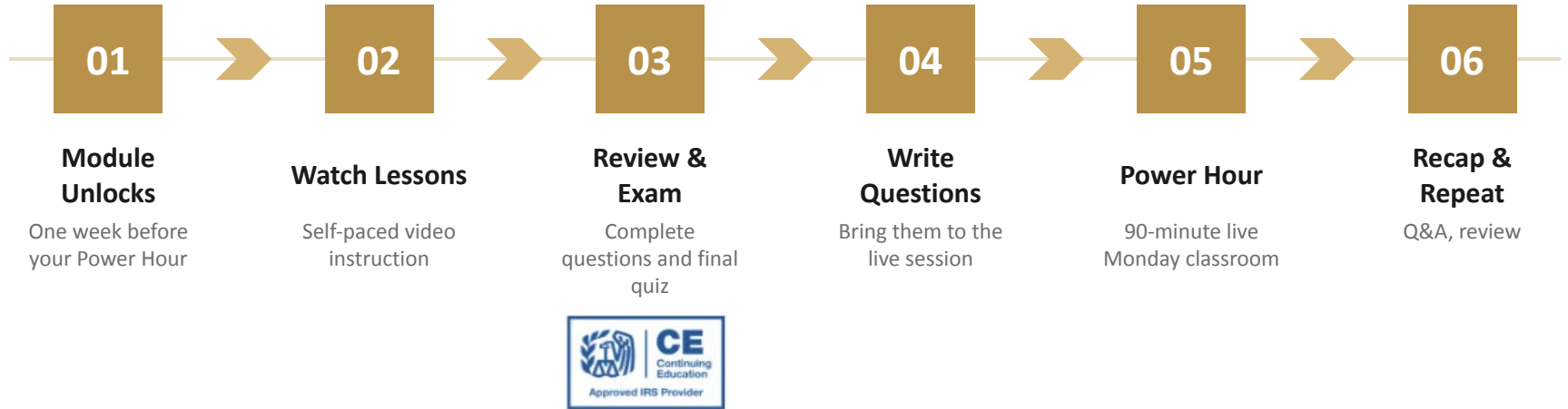
# Get Your *Full Guide*.

*Download the comprehensive 10-week masterclass program overview and course guide*

ACCESS THE MASTERCLASS GUIDE AT

<https://taxtrainingacademy.com/s-corp-masterclass-guide/>

# Your Weekly *Rhythm.*



# Take a Tour *Inside the Lessons.*

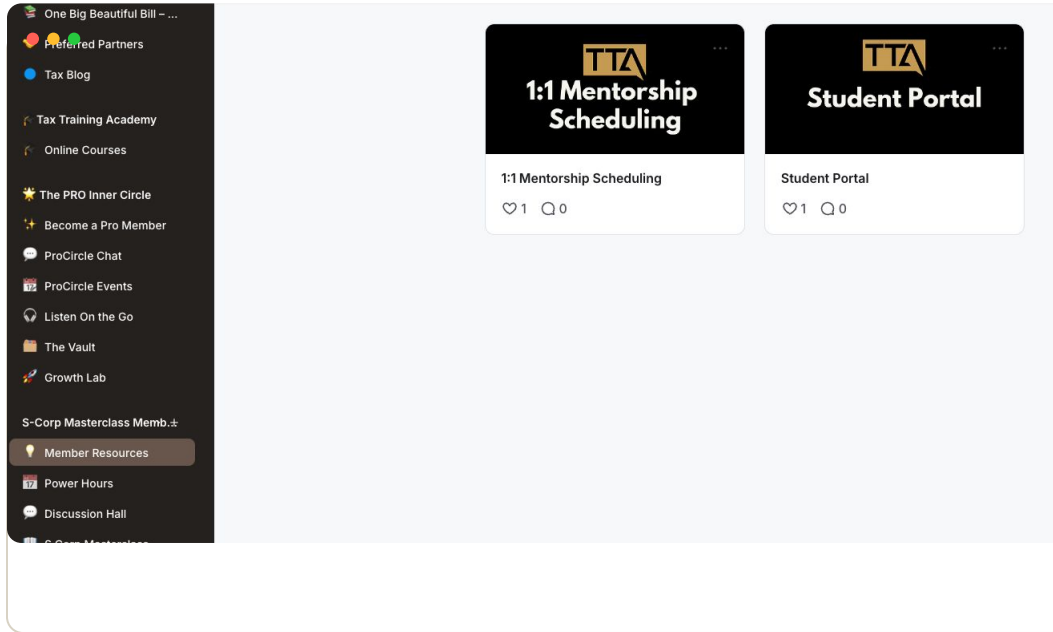
The screenshot shows a web browser window displaying the Masterclass Portal. The navigation bar includes links for Home, Course Introduction, and Modules 1 through 10, plus The Tool Box. The main content area is titled 'Home' and features a large video player for the 'S CORP MASTERCLASS' with a play button. To the left, there is a progress indicator showing '8 of 169' and a 'Discussion Hall Chat' button with a 'CLICK HERE' call to action. To the right, a profile card for Nadia Rodriguez, CPA, CTC, is displayed, including her title as 'Certified Tax Coach and Lead Instructor at Tax Training Academy' and social media icons for Facebook, LinkedIn, Instagram, and YouTube. Below the video player, there is an 'About' section with a trophy icon and a paragraph of introductory text. At the bottom right, a dark banner reads 'Schedule a 1:1 Mentorship'.

## Masterclass Portal

Get a behind-the-scenes look at the structured curriculum designed for tax professionals.

- **High-Definition Video Lessons** covering S Corp foundations to advanced strategies.
- **Downloadable Resources**, calculators, and implementation checklists.
- **Progress Tracking** to stay on course throughout the 10-week program.

# Go Inside the *Nadia CPA Inner Circle*



## Community Access

- ✓ Power Hours
- ✓ Discussion Hall
- ✓ Review Questions and Final Exam

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## MARKET PRICING

POLLING QUESTION: WHAT DO YOU CHARGE FOR PASS THROUGH RETURNS (1120S / 1065)?

# TurboTax

## *charged \$1,500 in 2023.*

*For a simple, first-year Form 1065 – prepared by phone, no advice, no relationship.*

**\$1,500**

ADVERTISED PRICE

*Federal only · state additional*

**1065**

RETURN TYPE

*Simple first-year partnership*

**Enrolled Agent**

WHO PREPARED IT

*10+ yrs experience · phone only*

**QuickBooks**

BOOKS ALREADY IN

*Still exported & uploaded manually*

Source: [The Accounting Podcast · Blake Oliver, CPA & David Leary · July 18, 2023 · accounting.show](#)

TIER I

## SELF-STUDY

\$2,497

*On-demand, learn at your own pace*

10 on-demand training  
modules

Start the moment you enroll

S Corp templates and  
worksheets

12-month course access

Private chat access (Level 1)

TIER II

\$200 Off w/ Code

## CORE

\$3,997

*Live cohort experience*

Everything in Self-Study

Weekly 1.5-hour live group  
sessions, available for Spring  
and Fall cohorts

S Corp eBook

12-month access to session  
recordings

FEATURED

TIER III

\$400 Off w/ Code

## CORE + VIP

\$7,497

*Live cohort + VIP coaching*

Everything in Core

Four 1:1 coaching calls with  
Nadia

Tax season office hours + VIP  
chat

Priority access during peak  
season

Free future Masterclass  
enrollments

PRO Inner Circle locked at  
\$75/month for life

Lifetime access to recordings

TO ENROLL VISIT:

[TAXTRAININGACADEMY.COM/S-CORP-MASTERCLASS](https://taxtrainingacademy.com/s-corp-masterclass)



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THANK YOU

# Your Turn.

## *Let's talk.*

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01

### Ask live

Drop your questions in the chat or unmute and join

02

### Review the guide

Program overview & full course guide

03

### Watch testimonials

Hear from prior students who have taken the leap

04

### Use the bonus

Enroll before midnight to claim the open house bonus