AMERICAN INSTITUTE OF CERTIFIED TAX PLANNERS



CO-FOUNDER & PRESIDENT OF THE
AMERICAN INSTITUTE OF CERTIFIED TAX PLANNERS

FOUNDER AND EDITOR-IN-CHIEF OF
THINK OUTSIDE THE TAX BOX
TAX REDUCTION NEWSLETTER

ACCOMPLISHED KEYNOTE SPEAKER,
TEACHER, BEST-SELLING AUTHOR AND
MENTOR TO TAX PROFESSIONALS
ACROSS THE UNITED STATES

The most valuable tax planning happens before the return is filed. Dominique shows professionals how to do it!

DOMINIQUE MOLINA

CPA, MST, CTS

SPEAKER PACKET 2026-2027 • CertifiedTaxPlanners.com • 619-935-4777 (ext. 1009)

1,500+
CPAs, EAs and Tax Attorneys
Trained & Certified

Best-Selling Author
9 Best Sellers on Tax Planning

Top 40
Most Influential Accountants
CPA Practice Advisor

BOOK DOMINIQUE
Phil@certifiedtaxplanners.com
619-935-4777 (ext. 1009)
CertifiedTaxPlanners.com

VISIONARY. EDUCATOR. INDUSTRY CHANGEMAKER.

DOMINIQUE MOLINA, CPA, MST, CTS

ADVOCATING FOR ACCOUNTANTS.

DOMINIQUE MOLINA *is the co-founder and President of the* ***American Institute of Certified Tax Planners*** *(AICTP). Dominique is best known and loved for her passionate advocacy for her colleagues in the fields of accounting and tax planning.*



Early in her career, Dominique Molina saw tax professionals leaving legitimate, tax code-based savings on the table for clients who trusted them. She has spent more than two decades closing that gap.

Dominique is co-founder and President of the American Institute of Certified Tax Planners (AICTP), the San Diego–based institute that trains and credentials CPAs, EAs and tax attorneys to deliver proactive, year-round tax strategy. Since co-founding AICTP in 2009, she has trained and credentialed more than 1,500 professionals nationwide as Certified Tax Planners.

She is founder and Editor-in-Chief of *Think Outside the Tax Box*, a publication on tax planning strategy for professionals and business owners, and CEO of MidasIQ, which brings tax-reduction education to the public.

Before starting AICTP, Dominique worked for the largest independently owned CPA firm in San Diego, and then spent seven years running her own tax, accounting, and business consulting firm, serving business owners and investors nationwide.

On stage she is practical, energetic and direct. Audiences leave with strategies they can cite, defend and put to work with clients the following week.

2009

Co-Founded AICTP

1,500+

CPAs, EAs and Tax Attorneys Trained & Certified

100+

Events, Interviews and Presentations

EDUCATION & CREDENTIALS

- B.S., Accounting
  San Diego State University
- MST, Taxation
  Thomas Jefferson School of Law
- Licensed CPA
- Certified Tax Strategist (CTS)



"I left energized and plan to accelerate the growth of my business." - Erwin Matthews

SIGNATURE TOPICS

Every program is customized after a planning call with your team, and can run as a keynote, breakout or extended CPE workshop.

KEYNOTE | 60 - 120 MIN

FROM PREPARER TO PLANNER: FINDING TAX-SAVINGS OPPORTUNTIES ON THE INDIVIDUAL RETURN, PARTNERSHIP, S CORP OR C CORP

Learn how to think like a Certified Tax Planner using the tax code and returns as a roadmap.

- Learn how to approach the tax return diagnostically
- Understand the difference between proactive work and reactive work
- Learn how tax planning differs from tax projections
- Estimate tax savings by examining a tax return

Best for: CPA societies, firm retreats, conferences

KEYNOTE OR PANEL | 45 - 60 MIN

UNMISTAKEABLY HUMAN: WINNING THE FUTURE OF TAX PLANNING IN THE AGE OF AI

AI is automating compliance work FAST. Judgement, accountability and trust are not. Dominique shows where advisors keep, and grow, their value and advantages.

- What AI changes, and what it can't
- Ethical use of AI and planning software
- Repositioning services clients will pay for

Best for: Leadership summits, tech and innovation tracks

KEYNOTE | 45 - 60 MIN

COOKING UP TAX STRATEGIES: WHAT *BREAKING BAD* TEACHES US ABOUT TAXES

Effective tax planning requires strategic, proactive approaches beyond compliance, including choosing structures that reduce liability, protect assets, and facilitate exit planning.

- Understand the Big Three Strategies: What, When & Why
- Convert questionable deductions into strategic investments
- Understanding the Shift from Compliance to Strategy

Best for: CPA societies, firm retreats, conferences

KEYNOTE | 60 - 120 MIN

THE WINNING COMBO: ELEVATING TAX FIRMS WITH TAX PLANNING EXPERTISE

Are you ready to evolve from a trusted tax accountant to a results-generating superhero? Create tangible, undeniable value by showcasing the significant impact you have on their bottom line through tax reduction.

- Understand the difference between proactive work and reactive work
- Learn how tax planning differs from tax projections
- Estimate tax savings by examining a tax retur

Best for: CPA societies, firm retreats, conferences

ONE EXPERT. MULTIPLE AUDIENCES.

CPA & ACCOUNTING FIRMS
- Advisory growth, pricing & packaging, team development, high level tax planning strategy

EAs & TAX PROFESSIONALS
- Advisory growth, pricing & packaging
- Early career professionals and startups

ESTATE, LEGAL & WEALTH
- Using tax planning to expand wealth building opportunity

BUSINESS OWNERS
- What proactive tax planning is and it's untapped opportunties
- How to find a qualified advisor

TECHNICAL DEPTH, PRACTICE-BUILDING FOCUS

Every program is customized after a planning call with your team.
These are some of the sessions CPA and professional audiences request most.

TAX PLANNING

Tax Planning Isn't What You Think It Is

Winning Combo: Elevating Accounting Firms With Tax Planning

Succession Planning and the Tax Strategy

Advanced Tax Planning Techniques

1040 Hot Spots:
Where Savings Usually Hide
(Also Available: S-Corp and C-Corp Hot Spots)

TAX LAW AND STRATEGY

Current Federal Tax Legislation Updates

Top Business Tax Mistakes and How To Avoid Them

Entity Selection Workshop

Business Entity Power Plays

Tax Strategies for Selling Assets

Rollovers for Business Startups:
Using Retirement Funds to Start a Business

PRACTICE & PROFESSION

Value Pricing and Getting Paid What You're Worth

Bundling Services for Recurring Income

The Power of NO:
Letting Go of Good Things to Make Room for Great

Unmistakably Human:
Tax Planning in the Age of AI

Navigating the Ethical Landscape:
AI and Tax Planning Software

I would be hard pressed to remember a more competent, better communicator or outstanding leader than Ms. Molina. She radiates poise and composure no matter how demanding the situation. She possesses both great personal integrity and professionalism. Her leadership causes others to want to emulate her, and as a result both she and her organization are in great demand all across the country.

R. Larry Farmer, Certified Public Accountant

It takes special talent and superior knowledge of andragogy, adult learning, to be an effective instructor and presenter who can disseminate information on timely topics, and explain and illustrate the ramifications of alternative solutions or outcomes and the effect they could have on firms and clients.

Dominique has the uncanny ability to be "tapped-in" to what tax accountants need to know. She uses her experiences, connections and perspectives as a way to teach others and instill confidence in other professionals.

Toni Patterson, M.Ed. Training & Development

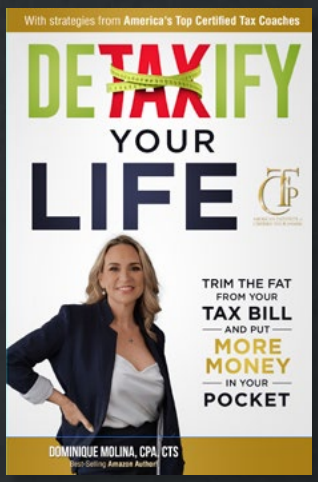
CPE/CE CREDIT YOUR ATTENDEES CAN COUNT ON

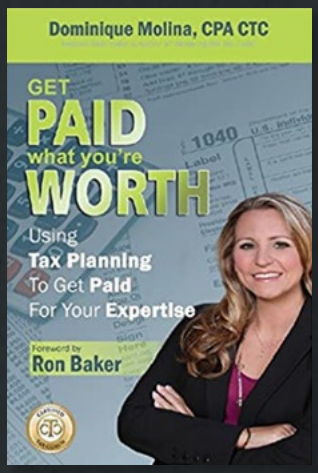
- Sessions can be delivered for continuing education credit through AICTP, a sponsor of NASBA's National Registry of CPE Sponsors and an IRS-Approved Continuing Education Provider for Enrolled Agents and other tax return preparers.

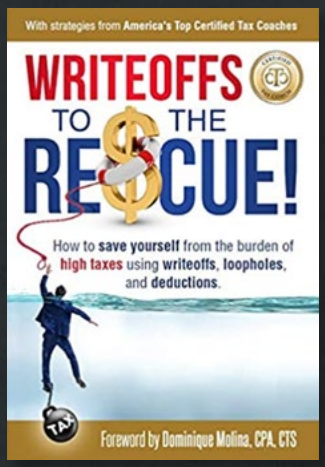
FIELD OF STUDY	CREDIT HOURS	SPONSOR IDs
[Confirm per session]	[e.g., 1.0-4.0 CPE]	[NASBA # / IRS #]

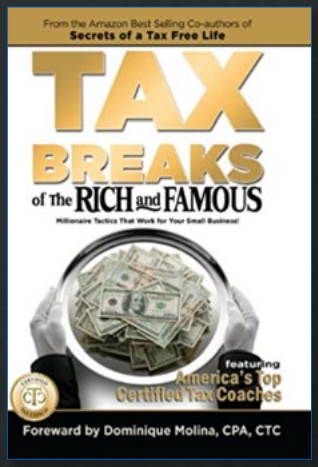
Best-selling author of tax strategy, and contributor to *Think Outside the Tax Box, Accounting Today* and the *EA Journal*.

BEST-SELLING AUTHOR









AS SEEN & HEARD

CNN Money - Tax expert community

Regional Television - San Diego, Los Angeles, New Orleans, Honolulu

Print & Radio - National and Trade Outlets

Podcasts - *On the Air with Accounting Today, The Unique CPA, The Abundant Accountant, Grow My Accounting Practice, Tax Crime Junkies*

STAGES & HONORS

Surgent CPE - Recurring Presenter

AICPA Women's Leadership Summit

CPA Practice Advisor **-** 40 Most Influential Accountants

San Diego Busines Journal - Business Woman of the Year Finalist 2025

Financial Services Champion Award - U.S. SBA, 2014







EASY TO BOOK. BUILT TO MAKE YOUR EVENT LOOK GOOD.

PHIL MALAVENDA - SPEAKER BOOKING, AICTP

Phil@CertifiedTaxPlanners.com • 619-935-4777 (ext. 1009)

Speaker Reel: Email Phil to request.

Press Kit and Headshots: https://certifiedtaxcoach.org/dmolina/

Fee

- On Request

Preferred Lead Time

- 60-90 days