



Tax and Revenue Management Certification Training Course

8 – 12 March 2027
Lisbon



Tax and Revenue Management Certification Training Course

Ref: 36271_94482 **Date:** 8 - 12 March 2027 **Location:** Lisbon **Fees:** 5700 Euro

Course Overview:

This course is designed to equip professionals with complete knowledge and skills in managing taxes and revenue effectively. Understanding the intricacies of Tax and Revenue Management is crucial for the survival and growth of any company. This course focuses on Strategic Tax Planning, Financial Statement Analysis for Taxes, and Corporate Tax Management, ensuring that participants can navigate the complexities of tax laws and regulations. The course also covers advanced topics like Tax-Free Mergers and Acquisitions, Tax Strategies for Multinational Corporations, and Tax Risk Management. By blending theory with real-world applications, this course prepares business managers, investors, and financial professionals to make informed decisions, optimize tax outcomes, and enhance their strategic planning capabilities.

Target Audience:

- Business Managers and Leaders at all levels
- Financial Controllers and Tax Advisors
- Strategic Planners and Analysts
- Investors looking to enhance their tax planning skills
- Non-finance Managers with financial responsibilities

Targeted Organizational Departments:

- Finance and Accounting Departments
- Strategic Planning and Business Development Units
- Risk Management Divisions
- Legal and Compliance Departments
- Investor Relations Teams

Targeted Industries:

- Corporate Finance
- Banking and Financial Services
- Multinational Corporations
- Public and Private Sector Enterprises
- Legal and Consulting Firms

Course Offerings:

By the end of this course, participants will be able to:



- Distinguish between different types of taxes and their regulatory structures
- Understand the framework of Tax and Revenue Management
- Recognize risk factors associated with various corporate forms and their tax implications
- Develop effective tax planning strategies
- Analyse financial statements with a focus on proactive tax planning
- Navigate the challenges of Tax and Revenue Management for multinational corporations

Training Methodology:

This training course utilizes a variety of proven learning techniques to ensure maximum understanding and retention. Participants will engage in interactive presentations, individual and group activities, and case studies that reflect real-world tax scenarios. This approach ensures that participants not only grasp theoretical knowledge but also develop practical skills applicable to their professional roles.

Course Toolbox:

- complete workbooks and reading materials
- Case studies and real-world examples
- Checklists and templates for tax planning and management

Course Agenda:

Day 1: Introduction to Tax and Revenue Management

- **Topic 1:** Tax Rates, Structure, and Origin of Regulations
- **Topic 2:** The Importance of Taxes in Business Decisions
- **Topic 3:** Types of Taxes
- **Topic 4:** Basic Principles of Taxation
- **Topic 5:** Sources of Tax Laws
- **Topic 6:** Important Principles and Concepts in Tax Law
- **Reflection & Review:** Understanding Regulatory Frameworks and Their Impact



Day 2: Strategic Tax Planning Framework

- **Topic 1:** Understanding the Framework of Strategic Tax Planning
- **Topic 2:** Identifying the SAVANT Framework: Strategy, Anticipation, Value-Adding, Negotiating, Transforming
- **Topic 3:** Choosing a Legal Entity: Risk Management, Raising Capital, and Tax Management
- **Topic 4:** Applying SAVANT to Entity Choice: Specialized Legal Forms
- **Topic 5:** Importance of Tax Planning in Strategic Decision Making
- **Topic 6:** Case Studies on Strategic Tax Planning
- **Reflection & Review:** Applying Strategic Tax Planning in Business Contexts

Day 3: Tax and Revenue Management in Practice

- **Topic 1:** Tax Decisions and New Product Development
- **Topic 2:** Company and Employee Tax Planning
- **Topic 3:** Market Penetration: Operating in Different Countries
- **Topic 4:** Financing Ongoing Operations and Tax Planning
- **Topic 5:** Financial Statement Analysis for Proactive Tax Planning
- **Topic 6:** Integrating Tax Planning with Business Strategy
- **Reflection & Review:** Practical Applications of Tax and Revenue Management

Day 4: Restructuring and Mergers

- **Topic 1:** Tax Management and Changing the Original Form of the Company
- **Topic 2:** Analysing Financial Restructuring Cases
- **Topic 3:** Business Restructuring and Its Tax Implications
- **Topic 4:** Legal Entity Restructuring and Tax Management
- **Topic 5:** Divestitures and Selling Off Parts of the Business
- **Topic 6:** Tax-Free and Taxable Mergers and Acquisitions
- **Reflection & Review:** Case Studies on Restructuring and Mergers



Day 5: Advanced Tax Strategies for Multinational Corporations

- **Topic 1:** Tax and Revenue Management for Multinational Corporations: Trends and Challenges
- **Topic 2:** Tax Strategies for Multinational Corporations
- **Topic 3:** The Use of Flow-Through Entities for Divestitures
- **Topic 4:** The Use of Flow-Through Entities for Acquisitions
- **Topic 5:** Liquidations and Sale of Subsidiaries
- **Topic 6:** Managing Bankruptcies and Tax Implications
- **Reflection & Review:** New Trends and Challenges in Global Tax and Revenue Management

How This Course is Different from Other Tax and Revenue Management Courses:

The **Tax and Revenue Management Certification Training Course** stands out by offering a complete and practical approach to understanding and managing taxes. Unlike other courses, this program integrates Strategic Tax Planning, Financial Statement Analysis for Taxes, and advanced topics like Tax-Free Mergers and Acquisitions. Participants benefit from real-world case studies, interactive sessions, and expert-led discussions that bridge theory and practice. This course is tailored for business managers, investors, and financial professionals, providing them with the knowledge to make informed tax decisions and optimize revenue management. With a focus on current trends and challenges in Tax and Revenue Management, this course prepares participants to tackle real-world tax issues effectively.