

Tax Plan Client Update

Dear Client:

Proper tax planning doesn't wait until April 15. It's a year-round process to anticipate changes affecting your taxes before you file. Tax planning is the key to minimizing your taxes.

We're asking these questions now so we can take advantage of any available savings before year-end. Please complete this checklist and fax or mail it to us at the address below. We'll review your answers and suggest any appropriate strategies.

Sincerely,

(Your Name Here)

This year, will you or your spouse:

- Marry or divorce
- Have a baby
- Adopt a baby
- Start or discontinue paying day care costs
- Incur unusually high medical expenses (braces, LASIK, etc.)
- Make charitable gifts (other than cash)
- Change jobs or retire
- Earn income from stock options or employer stock
- Start or discontinue Health Savings Account or Flexible Spending Account contributions
- Change health insurance
- Pay educational tuition or fees (for yourself or a dependent)
- Buy or sell your home
- Make gifts of more than \$12,000 to any one person
- Start or invest in a new business
- Close or sell a business
- Start or discontinue hiring contractors or employees for your business
- Start using your home for business
- Start using your car for business (other than driving to or from work)
- Increase or decrease your business income
- Buy or lease a new car/truck for business
- Buy or lease business equipment
- Sell business assets
- Start receiving IRA or retirement plan distributions
- Reach age 70½
- Buy or sell stocks, bonds, or mutual funds
- Buy, sell, or exchange investment real estate

Your Name: _____

Your Address: _____

Your City, State, ZIP: _____

Your Phone: _____

Your Email: _____

Your Name Here • Your Address Here • Your Phone Here