TAX SEASON IS NOT OVER!

Deadline extended to JULY 15, 2020

The Treasury Department and the Internal Revenue Service are providing special tax filing and payment relief to individuals and businesses in response to the COVID-19 Outbreak. The filing deadline for tax returns has been extended from April 15 to July 15, 2020. The IRS urges taxpayers who are owed a refund to file as quickly as possible. For those who can't file by the July 15, 2020 deadline, the IRS reminds individual taxpayers that everyone is eligible to request an extension to file their return.

We work all year around to make sure that all aspects of your financial plan and investments are functioning in the most tax-advantaged ways possible. Particularly with the new tax laws, we want to be extra prudent in reviewing your portfolios and plans.

To that end, if you haven't already sent us copies of your 2020 tax returns, please do so as soon as possible. Reviewing your 2020 returns will make it easier for us to determine what tax strategies are best for you for the remainder of 2020.

We want to do everything we can to make sure you avoid any unnecessary penalties or fees. But we can't do that without having copies of your 2020 tax returns.

Help us help you!

Ways You Can Send Us Copies of Your 2020 Tax Returns

-Send them via regular mail - we can send you a postage-paid envelope.

-Drop them off at our office - we'd love to see you, and we'll copy them for you.

-Securely upload them to your WealthMatch vault - call us to learn how.

-Fax them to us - we still have one of these machines. :-)

If you have any questions or need assistance, don't hesitate to email or call us.

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