



May 15, 2020

Can you relate to this feeling?

It's shocking how many people do zero strategic financial planning. They simply turn in statements to a tax person each year and write the check.

Wouldn't you rather be proactive and pay less? While it's not the number one factor when making decisions, you shouldn't ignore the tax side of your financial decisions. They almost always have some kind of tax impact. Many people we meet have an investment advisor or insurance agent who does not communicate or coordinate with the tax person -- they're advising without working together and that costs you money. *(side note: we don't draft tax returns, but as your fiduciary, we are happy to work with your trusted tax professional to make sure your financial life is optimized).*

If you haven't heard yet, our state and federal governments have been spending and borrowing a few bucks lately!

My hunch is that income taxes will be much higher in the future.

You better plan ahead because it's coming eventually. If you want to discuss some ideas to reduce your current or future taxes, schedule a call with us. Have a great weekend.

Sincerely,

Certified Financial Fiduciary®

Click [HERE](#) to read our google reviews.

Schedule a Call

