



April 7, 2022

It's your favorite time of year: TAX TIME! :)

I know it's stressful and complex, especially when you have a lot going on financially. I think it's overly complex on purpose. Reducing your taxes actually brings a smile to my face. [Watch this 45 second video above to see the nice surprise we got for a brand new client.](#)

We know that it's not what you make, but it's what you keep that matters. For that reason, our team at [PACIFIC CAPITAL](#) takes a deep look at your whole financial situation through our trademarked process: [The Tax Mitigation Method™](#) to identify any opportunities to help you keep more of your own money.

You might initially come to us looking for strategic advice and investment guidance on what to do with your money. One of the first things we often uncover is that you're being underserved by your "tax person." You don't need to be the expert yourself, but you should be working with experts. Some of you already have great tax professionals helping you out - and we want to work together with them on your behalf. However, some of you have outgrown your tax people!

You should be planning and preparing all year, and finding ways to keep more of your money. Our [The Financial Life Inspection®](#), assesses 100 checkpoints in a variety of areas, including taxes. We don't draft tax returns in house, but we know many professionals that can help you.

If you can relate to this video and have a desire to get a second set of eyes looking at your financial life, let us know! Simply [click here](#) to schedule a time to talk with us. Have a great rest of the week and upcoming weekend!

[Do you have a tax preparer or a tax strategist?](#)

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Sincerely,



Chad W. Willardson
WEALTH ADVISOR FOR ENTREPRENEURS

Certified Financial Fiduciary®

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