



April 17, 2018

## HAPPY TAX DAY!

Now that 2017 taxes are behind you (most of you), it's time to turn your eyes to the new changes from the "Tax Cuts and Jobs Act of 2017."

We highly recommend you get together with your tax professional to discuss any strategy-shifting ideas that may benefit you and your business.

### One idea for you:

We recently participated in a very productive "strategy session" with one of our clients, their CPA, and an estate/tax attorney. Our discussion together resulted in a few great takeaways to benefit our client going forward. A financial plan that is comprehensive and integrated is much more likely to succeed.

Contact us today at 844-777-8777 if you'd like to see a free demo on how a [Financial Life Inspection](#)<sup>®</sup> could give you valuable advice and guidance on your taxes or other areas of your financial life. Whether they have a net worth of \$50 million or \$500,000, clients have found the process to be very worthwhile.



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