



February 10, 2021

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

You might initially come to us looking for strategic advice and 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."

2 common mistakes high-income entrepreneurs make:

- Overpaying taxes (no strategic tax planning)
- Not taking advantage of the right investment accounts or even investments that could reduce their taxes

[Can you relate to either of these?](#)



You don't need to be the expert yourself, but you should be working with experts. It's not good enough to simply hand over your statements to the tax people and then find out how much you owe. You should be planning and preparing all year, and finding ways to keep more of your money.

Are they proactively giving you ideas and strategies? Maybe your tax person is towards the end of their career and isn't really keeping up to speed on what's happening out there? We have many different professionals in different states that could talk with you about improving the advice you're getting.

As always, if you're looking for advice to reduce the financial stress in your life and set you up for a better lifestyle of financial freedom, [click here](#) and let's talk soon.

Have a great upcoming weekend!

[Stress Free Money](#)

[Smart Not Spoiled](#)

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Sincerely,



Chad W. Willardson
WEALTH ADVISOR FOR ENTREPRENEURS

Certified Financial Fiduciary®

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