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NEWSLETTER
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SPRING IS JUST AROUND THE CORNER

With the arrival of spring comes the filing of corporate income tax returns, due the 15th. Procrastinators can extend their filing dates to September 17th.

TAX SEASON SURPRISES

Too bad we wait until our taxes are due to let us know what you did the past 12 months with your money. We are seeing too many clients who have been misled by their banks, insurance agents and others to “roll over” their annuities to another company to get a better rate of interest. One client did so but the insurance agent “forgot” to tell her that there would be a surrender charge of \$15,000!!!!

For almost 15 years now, we have been suggesting that before you enter into any material financial transaction, you run it by us first. So far, too many of you don't and it has cost you thousands of dollars. So again, we extend our offer to review any material financial transaction you are thinking of doing, whether it be a purchase of an annuity, business, life insurance, or a bank CD.

SCHEDULE YOUR APPOINTMENT PLEASE

If you need to speak with your tax preparer, please schedule an appointment. Failure to do so can result in needless waiting for you and other clients.

TAXPAYER'S RESPONSIBILITIES

- Before I sign my tax return, I will review it to verify that the information contained in it is true and accurate
- I will keep adequate records for local and out-of-town travel, business gifts and entertainment
- I will report all taxable income and will not inflate deductions or claim personal expenses as tax deductible

AMT GOT YOU?

Alternate minimum tax (AMT) was originally aimed at 19 multimillionaires who paid no U.S. income tax. Now, AMT is snaring non-millionaires, the working folks of America.

IF YOU LIKE OUR SERVICE, TELL OTHERS. IF YOU DON'T, TELL US.

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