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NEWSLETTER
MAY 2006

PERSONAL PROPERTY TAX RETURNS

May 15 is the filing deadline for these soon, we hope, to be gone unpopular tax forms. If you choose to prepare these returns yourself, do ensure that the assets and figures you supply the assessor agree with your federal income tax return.

YOUR FINANCIAL WELFARE

One recurring theme during this past tax season was the utter disappointment of many clients regarding their investments. Too often we heard the lament:

“Why didn’t my _____ (you fill in the blank) tell me that!
Had I known that, I never would have _____ (again, you fill in the blank).

Since June of 1993, our *Newsletter* has sent out invitations to our clients to make an appointment for their financial checkup. Unfortunately, the appointments are made after the transaction was completed. By then it is too late to try to undo the transaction.

Before buying an insurance policy, selling a security or property, investing in an annuity, rolling over an IRA, or withdrawing money from an IRA contact us. We will **objectively** tell you the tax cost associated with that particular transaction. Remember, just like the commercial, you can pay us our modest fee now or pay Uncle Sam thousands of dollars.

ESTIMATED INCOME TAX PAYMENTS

Sounds like a broken record or beating a dead horse, but again we are getting notices from IRS and the Indiana Department of Revenue showing our clients didn’t pay the taxes they told us they did. Perhaps the only way to get rid of this annual ugly chore is to have you provide us copies of the cancelled checks or other proof of payment.

MEMORIAL DAY

We will be closed Monday May 29, 2006 to celebrate the national holiday.

OFFICE HOURS

Beginning June 2, our office will close at 1:00 p.m on Fridays. We will continue this schedule until Labor Day. Monday through Thursday, our office hours remain 8 a.m. to 5 p.m.

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

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