

Tax Season is almost over!!



Most of you have filed your 2022 taxes and said “goodbye and good riddance” to tax season. You probably won’t be thinking about taxes again until next year. And that’s fine... you deserve a break from the stress of tax season.

We, on the other hand, work all year round to help make sure that all aspects of your financial plan and investments are functioning in the most tax advantaged ways possible. Particularly, with the new tax laws, we want to be extra prudent in reviewing your portfolios and plans.

To that end, if you haven’t already sent us copies of your 2022 tax returns, please do so as soon as possible. Reviewing your 2022 returns will make it easier for us to determine what tax strategies are best for you for the remainder of 2023.

We want to do everything we can to help make sure you avoid any unnecessary penalties or fees. But we can’t do that without having copies of your 2022 tax returns.

Help us help you!

Ways You Can Send Us Copies of Your 2022 Tax Returns

- Drop them off at our office – we’d love to see you, and we will copy them for you.
- Securely upload them to your Black Diamond Vault – call us to learn how.
- Ask us for an encrypted email

If you have any questions or need assistance, don’t hesitate to email or call us.

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