



PIECES OF THE PUZZLE

October 2020

INDIVIDUAL YEAR-END TAX PLANNING

As part of the range of services we offer to our clients. One of the most important is year-end planning. Year-end planning allows us to meet with you, our client, to assess what has transpired over the past year. The following are included in our year-end planning service:

- Consult and plan to reduce potential income tax for 2020 (i.e., retirement contributions, prepayment of certain expenses, etc.)
- Plan for income tax impact of any non-recurring transactions that have occurred in 2020 (i.e., sale of business or investment property, capital gains, etc.)
- Estimate of income taxes for 2020 and consult on payment of the required income tax in accordance with the Internal Revenue Code.

If you would like to review the past year, please contact our office to schedule a mutually convenient Go To Meeting appointment time to review your finances in preparation for year-end. If we do not hear from you, we will assume that you do not need this service this year.

We look forward to meeting with you soon.

**Howard &
Company**

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