

Tax Planning & Preparation

TAXES
RECEIPTS

Get the Most Out of Your Money

Now, more than ever, Americans should take steps to maximize the benefits of tax planning strategies. Proper tax planning can reduce eventual estate taxes, augment the amount of funds you will have available for retirement, and assist you in managing cash flow to help meet your financial objectives.

Nearly all financial decisions have tax ramifications. Tax liabilities associated with income, estate, gift, state, excise, and sales taxes can take a real toll on your wealth. Our team of experienced professionals can help coordinate the various aspects of your financial plan to maximize tax-efficient strategies in line with pursuing your overall financial goals.

Proper Tax Planning Can Achieve The Following Goals:

- Maximize the amount of money you will have for retirement
- Lower this year's tax liability
- Defer this year's tax liability to future years
- Reduce your tax liability in future years
- Maximize the tax savings from allowable deductions
- Take advantage of available tax credits
- Maximize the amount of wealth that stays in your family
- Minimize capital gains tax
- Avoid penalties for underpayment of estimated taxes
- Free up cash for investment, business, or personal needs
- Transfer assets to loved ones in the most tax-efficient manner
- Manage your cash flow by projecting when tax payments will be required
- Minimize estate tax in order to leave as much as possible to beneficiaries

Contact us for a free tax analysis today!

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