

1.2 Preparing the Tax Letter

Resource Requirements:

- Client account data from custodian
- Excel document with data and merge field


The aim of this exercise is to create a tax letter to be sent to each of your top clients along with an appropriate gift (optional but highly recommended). The final letter ought to look something like the image below.

PLEASE GIVE THIS TO YOUR TAX PREPARER

Jarvis Financial

2017 Tax Information

Dsample, Joe



JARVIS
FINANCIAL

The following is a list of your accounts held through Jarvis Financial and the respective tax forms that you will need from each account to complete your 2017 tax return. Please note that we only have tax information on accounts through our office.

Account Name	Account Number	Tax Form Needed	Special Notes:
Fidelity - IRA, Farrell	123472	NO	None
Fidelity - ROTH, Farrell	123473	NO	None

PLEASE REMEMBER THE FOLLOWING:

- ⇒ The deadline for companies to make form 1099 available is February 15th.
- ⇒ All IRA and ROTH IRA accounts will generate a form 5498 which can be ignored.
- ⇒ Deductible advisory fees (if any) will be listed on the "account fees" section of your 1099. Fees taken from your IRA or ROTH are NOT deductible because they were paid with tax free money (which is better than being deductible).

If you are missing a 1099 or if you have any questions or concerns regarding your accounts through our office, please contact Colleen. Once your 2017 tax return is complete, please send Colleen a copy so that we can continue providing you with the best possible tax strategies.

SCAM ALERT – Please assume that every email or phone call you receive is a scam until proven otherwise. The IRS estimates that people are losing \$5,000,000 A YEAR to scam artists pretending to be the IRS. Don't be the next scam victim! When in doubt, call our office.

Our attorneys would like us to remind you that this report is provided as a courtesy and is for informational purposes only. Only the tax information you receive directly from your investment companies should be considered official. This guide is not a replacement for having a licensed professional complete your tax return.

Image 1.1 – Sample Tax Letter Format