

TAX PLANNING GUIDE

2023

Tax Planning Guide 2023 Booklet - An informative guide to help you and your clients understand how taxes affect your personal and business tax situation. Provide valuable insights to help guide them through the tax planning process. Personalize it with your contact information to promote your brand, and you as the trusted professional.

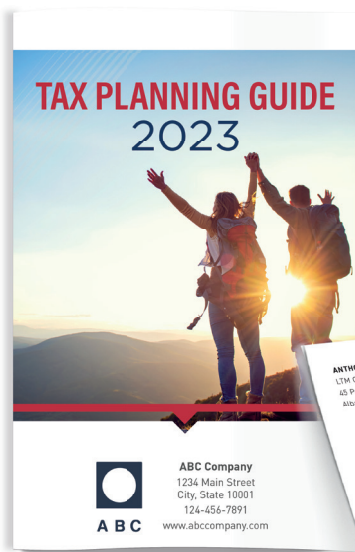
In 2022, the headlines were dominated by rising inflation. This resulted in the largest percentage increase in Social Security payments in decades. Use this guide to educate your clients and prospects on the changes and how they might be impacted.

Notable Changes Include:

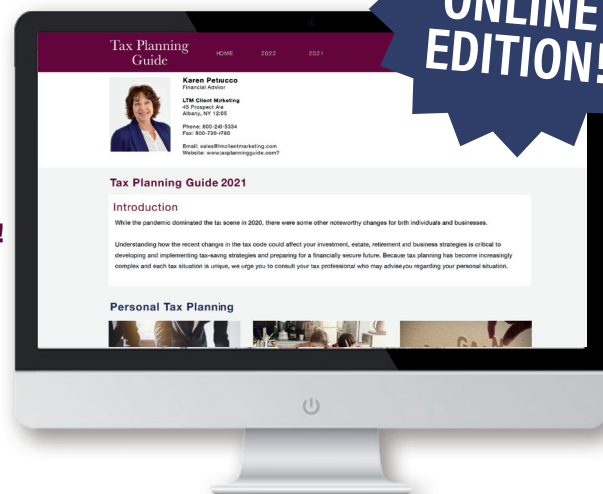
- Social Security Payments
- Inflation Reduction Act
- Contribution and income limits increase due to rising inflation
- Corporation tax changes, 15 percent minimum and new 1 percent excise tax
- SECURE 2.0 Act Insert highlighting noteworthy changes

NOW AVAILABLE:
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2.0 ACT INSERT

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Anthony Penree | Director
apenree@ltmclientmarketing.com
518-870-1081



Karen Petrucco | Account Manager
kpetrucco@ltmclientmarketing.com
518-870-1082



Alison Brew | Account Manager
abrew@ltmclientmarketing.com
518-870-1083



Mia Murphy | Designer
mmurphy@ltmclientmarketing.com
518-435-9300