



# THE PEOPLES PRESS

MARCH 2021

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# Planning for Tax Season?



Tax season can be stressful and stir up conflicting emotions. While it is rewarding to note the growth of your earnings and assets, paying more taxes on those gains can be frustrating.

I have the knowledge and experience to help you develop effective tax season strategies with your tax advisor to ensure that you are positioned to:

- Pay no more than your fair share in taxes
- Develop an effective overall strategy as you pursue your long-term financial goals
- Align your 401(k) investment selections with your total financial picture, including other personal savings, pending expenses (e.g., your children's college education) or your current debt.

Gain confidence knowing you've had an experienced financial professional take the time to review your portfolio. Because no matter what size your portfolio is, factors such as over- or under-weighting in various asset classes, less-than-optimum investment vehicles in taxable versus tax-deferred accounts, portfolio overlap and other considerations can seriously impact your returns and influence the amount of risk you may be unknowingly assuming.

My goal is to help you keep more of your earnings after taxes and inflation, so as you pull together documentation for filing your tax return, it would be my pleasure to examine your current investments to ensure you remain on track toward your financial goals.

I look forward to speaking with you soon.



*Tyler Kozelka*  
LPL Investment Representative

**Schedule Your Complimentary Financial Review**

**Contact Audra, Administrative Assistant: 608-326-3540**

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