**Subject Line: Finding Insights In Your Tax Returns**

While we understand that taxes may not be the most exciting topic, they do present a fantastic opportunity for us to reassess and refine your overall financial strategy. By incorporating your tax situation into our overall approach, we can work together to help manage your tax liability. Some of the ways we leverage tax returns in our overall process include the following:

* **Tax-Efficient Portfolio Management:** A thorough understanding of your tax situation puts me in a better position to understand your overall personal finances. That can allow us to discuss different approaches, which may lead to a more tax-efficient investment strategy.
* **Retirement Optimization:** Comprehensive knowledge of your tax situation allows me to better understand the role each of your retirement accounts plays in your overall financial strategy.
* **Tax-Sensitive Withdrawal Strategies:** Taxes are one factor to consider when withdrawing money from your accounts during retirement. I can show you illustrations so you can better visualize why tax management is a critical factor when making withdrawal decisions.
* **Coordination of Tax Strategies with Your CPA:** Having a clear understanding of your tax situation allows me to collaborate effectively with your certified public accountant (CPA). A well-structured financial strategy should take into account your tax situation as well as a variety of other factors.
* **Ongoing Tax Management:** Tax laws and regulations are constantly changing. By reviewing your tax returns periodically, I can show you potential adjustments in your financial strategy that may help address new laws and regulations.

Whether you filed in April or have an extension, at your convenience, upon completion of your returns, please call our office to arrange a time to review your tax returns together. Alternatively, we can provide you access to our secure portal, where you can safely upload your documents. Please remember not to email your tax returns directly.

Thank you for the trust you've placed in our team. We remain dedicated to helping you pursue your family's financial goals and are honored to be part of your journey.

Talk to you soon,

[Your Name]

***Please make sure you submit through your regular compliance review process.***