



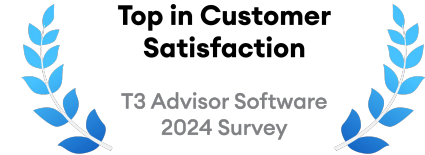
LIVE DISCUSSION:

Turn Tax Season into a Year-Round Growth Engine

Build a Scalable System That Drives
Retention, Referrals and New Clients



An award-winning marketing suite. Built just for you.



Our expertise is **showing off yours.**





Why Are Taxes Key To Growth?

(Some Data...)

tax bracket in retirement
Search term



“Tax Bracket In Retirement”

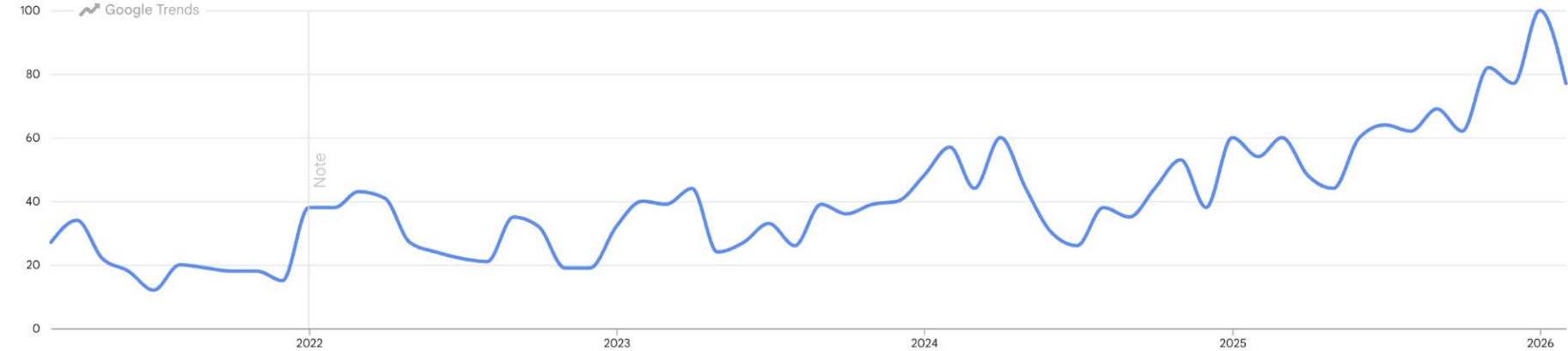
United States

Past 5 years

Web Search

Interest over time

United States · Past 5 years



● how to pay less taxes
Search term



+

“How to Pay Less Taxes”

📍 United States ▾

📅 Past 5 years ▲

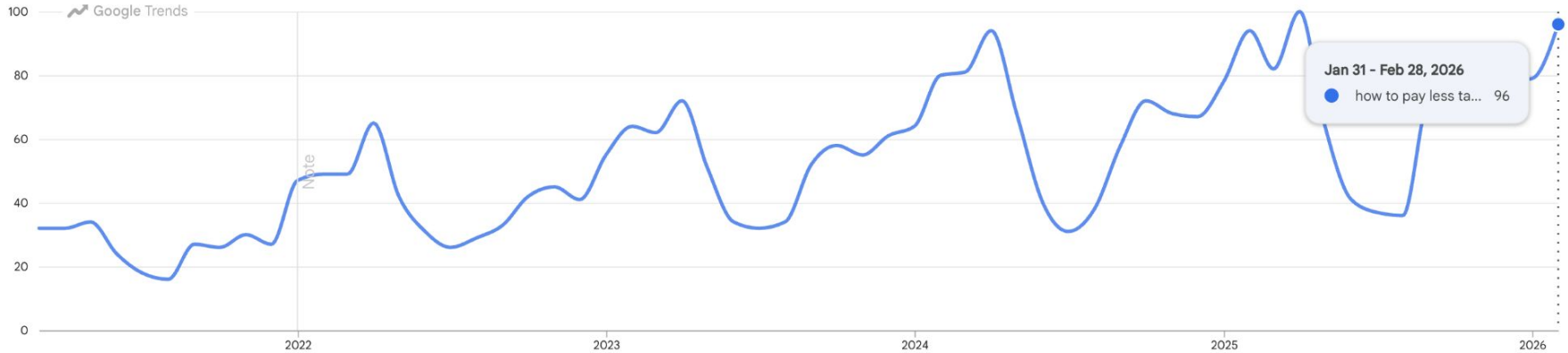
🌐 Web Search ▾

Interest over time ⓘ

United States · Past 5 years



Google Trends



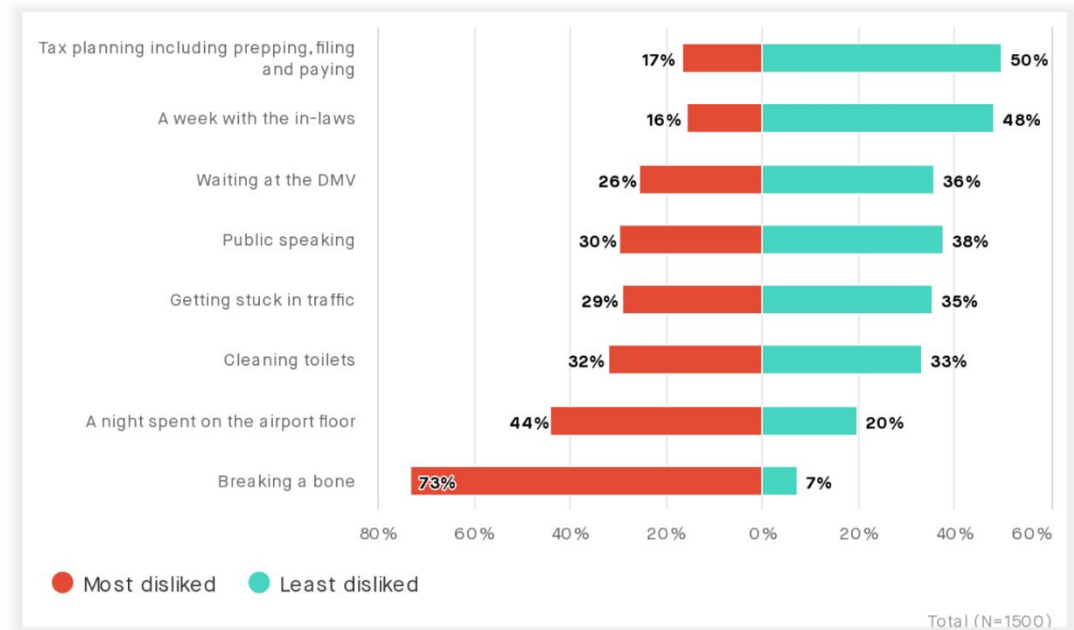
#1 for The
Wealthy!

WHAT THE UNADVISED ARE INTERESTED IN RECEIVING HELP ON

- 1 Retirement income
planning (27%)
- 2 Social Security/Medicare
advice (22%)
- 3 Developing a financial
plan (22%)
- 4 Tax guidance (21%)

People dislike tax planning about the same as spending a week with their in-laws.

- Breaking a bone is overwhelmingly the most disliked from a list of unpleasant activities.
- Cleaning toilets, public speaking, and traffic jams are moderately disliked.
- Tax planning and spending a week with the in-laws are disliked about the same amount – and both are a little more tolerable than waiting at the DMV.



Heat Map Analysis

Visualizing The Wealth Management Delivery Gap

Wealthy Investors Service Heatmap
(By total)

	Investment management	Tax planning	Estate planning	Wealth protection planning	Charitable planning
Services desired by wealthy investors	92.1%	89.2%	91.1%	73.8%	87.3%
Services received by wealthy investors from their advisors	72.1%	24.8%	22.4%	7.5%	6.0%



So What Do You Do?

(Start with your Messaging ...)

Website: Explain (In Layman's Terms) How You Help with Tax Planning

When people are looking to hire us, a few common things we hear are...

"My advisor seems to focus on investments but doesn't specialize in tax planning and retirement income planning."

YOUR TEAM



**Simple
Language:**
Write so a
9th grader
can
understand

It's a Long Game

When people think about tax planning, they think about what they can do this year.

But in reality, we see it as a long game.

- Where are tax rates going?
- What will income look like for you in the future?
- What's your giving plan?
- When will we use certain investments?

Questions like this come to mind as we're planning the next 10-20 years of your taxes.

And they help guide us as we're designing your plan with minimal taxation in mind.

Your Money Can Go to Four Places:

- You
- Your family
- Charities
- The Government

Deciding ahead of time where you'd like your money to go is the first step to proper tax planning.

Show the Power of Holistiplan If You Use It



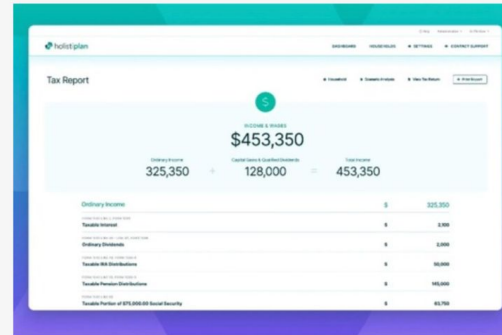
[About](#) [Business](#) [Individual](#) [Who We Serve](#) [Resources](#) [Connect](#) [Client Center](#)

Uncover Hidden Tax Savings with Holistiplan

Holistiplan simplifies tax planning, offering breakthrough services designed to help you maximize your wealth. We use this software to analyze your financial documents and identify opportunities for growth, including Roth conversions, tax-efficient withdrawals, charitable giving, and more - so you can make the most of your money.

Discover Tax Strategies to Maximize Your Wealth

Holistiplan uncovers opportunities within your financial plan that can help you minimize tax burdens and keep more of your hard-earned money. We analyze your tax situation to identify hidden strategies, like Roth conversions and tax-efficient withdrawals, giving you a clear path to optimizing your wealth.



BrokerCheck by FINRA



Source: <https://www.premierretirementadvisors.com/about-holistiplan>

TAX PLANNING & EDUCATION

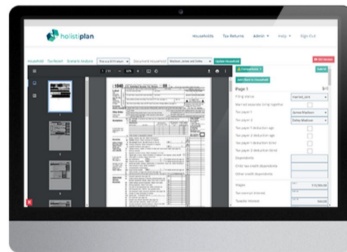
Using AI to Identify Tax Opportunities in Your Financial Plan

The days of personalized tax services are nearly gone. These days all you see are self-service online websites or tax prep services that look to prepare and finalize as many tax returns as possible in the shortest amount of time. This leaves so much room for opportunity on the table. As a financial planner, we can analyze your financial picture to identify unique strategies and work within the tax code to mitigate the effect that taxes will have on your accounts. And with the power of Holistiplan, we can employ the use of artificial intelligence to help find those gaps in a fraction of the time.



LET'S TALK MORE ABOUT THIS

Source: <https://www.jongladstone.com/tax-planning>



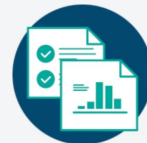
Holistiplan

Using advanced Optical Character Recognition (OCR) technology, Holistiplan can read a tax return and create reports instantly. This analysis can build out scenarios allowing us to immediately identify key income break points for tax planning opportunities like ROTH conversions, tax-efficient withdrawals, charitable giving, and much more.



Step 1

Upload your form 1040 tax return.



Step 2

Receive a report with key metrics and planning opportunities



Step 3

Dig deeper with scenario analysis tools

A Quick Video Walkthrough of How You Use the Tax Return? ...Even Better

Intro to Holistiplan

We are very excited to introduce a new service. While we cannot provide tax advice, we have partnered with Holistiplan that will help us better analyze tax returns and generate a concise deliverable, so that we can be more proactive on your behalf!

2021 TAX REPORT FOR PETER PROFESSOR
Questions on the numbers you see here? Click the icon for an explanation.

KEY FIGURES

Total Income:	\$403,950	Filing Status:	Married Filing Jointly	Tax Exempt Interest:	
AGI:	\$399,092	Marginal Rate:	24.0%	Qualified/Ordinary Dividends:	\$11,500 / \$15,000
Deductions:	\$32,500	Average Rate:	19.7%	ST/LT Capital Gains:	\$9,000 / \$22,500
Taxable Income:	\$361,840	2022 Safe Harbor:	\$87,550	Carryforward Loss:	\$0
Total Tax:	\$79,590			Credits Claimed:	\$550

MARGINAL TAX BRACKET INFORMATION
The marginal tax rate for your ordinary income is as follows.

Marginal Rate	Ordinary Income Threshold	Your
10.0%	\$0 to \$19,900	
12.0%	\$19,900 to \$81,050	
22.0%	\$81,050 to \$172,750	
24.0%	\$172,750 to \$29,850	You: \$27,840
37.0%	\$120,850 to \$418,850	
35.0%	\$418,850 to \$268,300	

MODIFIED ADJUSTED GROSS INCOME TIERS

Planning Opportunity	Limits	Over/Under?
Net Investment Income Tax	\$250k	Over 2%
Coverdell ESA	\$190k - \$220k	Over 2%
Roth IRA Contribution	\$198k - \$208k	Over 2%
Lifetime Learning Credit		
Student Loan Interest Deduction		
American Opportunity Credit		
Child Tax Credit		

Data Missing
We need some additional information for this tax report. Please ensure the taxpayer has a state and that all clients have birth dates entered.

Add **CTAs** to collect leads around tax planning

Withdrawal Strategies Combined with Tax Planning

One of the biggest impacts on how much tax you pay over your lifetime is the withdrawal strategy you decide to implement. In our tax planning meetings, we'll be able to go over the various options you have and how it affects the amount of tax you'll pay.

GET STARTED

Source: <https://streamlineplanning.com/tax-reduction/>

LEARN HOW TO AVOID THESE 6 COMMON TAX ERRORS

Knowing how you need to file your taxes depends on your income and filing status, as well as which deductions and credits you can claim. In this free ebook, we share some common errors to avoid.

First Name

Last Name

Email

GET EBOOK

"Audit" is a word that can strike fear into the hearts of taxpayers.

However, the chances of an Internal Revenue Service audit aren't that high. Between 2010 and 2020, the IRS only audited 0.49% of all individual tax returns.¹

And being audited does not necessarily imply that the IRS suspects wrongdoing. The IRS says an audit is just a formal review of a tax return to ensure information is being reported according to current tax law and to verify that the information itself is accurate.

Common Tax Errors to Avoid

Filing your taxes can be an involved process, and accidental errors can be easy to make. Grab this handy guide to get some tips to avoid some common filing errors.

First Name

Last Name

Email

[GET MY FREE GUIDE](#)





Once you have your email list...

Setup automated drip campaigns

FMG Automates Email Follow Ups

Prospects Only - Thank You For Downloading "Common Tax Errors" 2 Emails

An email sequence covering the many mix-ups and mistakes taxpayers make and what can be done to better manage their tax situation.

Customize before use. Add this Lead Generation ebook to your homepage or to a custom page and add your link to all emails.

Type

Email Sequence

Author

Do It For Me

Keywords

- Solutions
- Clients
- Strategies
- Taxation
- Goals
- Wealth
- Relationships
- Management
- Insights
- Finance
- Email

Thank You For Downloading – Here's How We Can Help

Download As PDF

Expand Email ▼

Hi {Firstname},

Thank you for downloading *Common Tax Errors*. We hope it offers valuable insights as you navigate your financial journey.

Since you've taken an interest in this resource, we wanted to share a little about who we are. At [Insert Firm Name], we've been helping clients manage their wealth for over [X Years] years. Our firm specializes in [Insert Specialization/Services, e.g., "comprehensive retirement strategies, wealth management, investment approaches"], tailoring each solution to meet the unique needs of each client.

What sets us apart is our commitment to building genuine, lasting

🕒 Delay 7 days

Example Email to To send to prospects

Hi {Firstname},

As we approach the tax filing deadline, we wanted to remind you of the importance of taxes and provide you with some information on how to be prepared for the upcoming changes in the tax laws.

The current tax laws are constantly changing, and it can be challenging to stay on top of all the updates and ensure that you take advantage of all available tax benefits. That's why working with a tax professional who can help you navigate these complexities and develop a strategy is essential.

We are happy to coordinate with your tax professional to discuss how we can create your overall financial strategy. Keep in mind that this article is for informational purposes only and is not a replacement for real-life advice, so please speak with your tax professional before modifying your tax strategy.

Some of the fundamental changes that may affect you include the following:

- **Income tax brackets shifted a bit**
 - There are still seven tax rates, but each rate's income ranges (tax brackets) have shifted slightly higher.
- **The standard deduction increased slightly**
 - After an inflation adjustment, the 2022 standard deduction has increased to \$12,950 for single filers and married couples filing separately and to \$19,400 for single heads of household. For married couples filing jointly, the standard deduction has increased to \$25,900.
- **Itemized deductions remain mostly the same.** The following rules for itemized deductions have mostly stayed the same for 2022, but they are still worth pointing out:
 - **State and local taxes:** The deduction for state and local income taxes, property taxes, and real estate taxes is capped at \$10,000.
 - **Mortgage interest deduction:** The mortgage interest deduction is limited to \$750,000 indebtedness. However, people who had \$1,000,000 of home mortgage debt before December 16, 2017,

You Will All Get This Email Template To Ask Clients for Tax Returns!

Dear Samantha,

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.

...

You can [upload your tax return via our secure portal here](#). Please remember not to email your tax returns directly.

...



**Next, schedule social media posts
that talk about tax planning**

Talking about Taxes on social Media doesn't have to be boring

Mando Sallavanti III, CFP® · 2nd
Gen Z's Financial Planner | Transforming Your Mone...
4h · 🌐

What if I told you that you could have no taxes in retirement?

@Mando Sallavanti III
Manage money efficiently

This isn't a pipedream.
It's a Roth IRA.

ROTH

Alex Koynoff and 67 others · 63 comments · 1 repost

MARKETING TOOLS

 Content Library Website > Blog > Automated Marketing Email > Social >

Post On Social Media

Shared & Scheduled

Manage Social Media

 Events >


SETTINGS

 Profile > Contacts >

EXTRAS

 Help >

Use Article From Curator

 Browse Social Post Library Schedule Post

Post On Social Media

Ready to share a post to your social networks? You're in the right spot to engage with your followers and create new connections!



Your Post

1,183 / 2,999

Preview

Do you think your tax rate will be higher in the future?

Look at this chart by YCharts showing the historical tax rates for the lowest and highest tax brackets.

For the highest bracket, the historical average (not the high) is 57.69%, although we are currently at 37%.

Some believe that taxes may increase in the future. Here are the facts:



+ Upload Image

 Design An Image

Social Profile Name

@socialhandle

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Some believe that taxes may increase in the future. Here are the facts:

- Higher tax rates may be part of any proposed solution to the current U.S. deficit.
- The time to manage your taxes is when you understand the current rates.

Every person's situation is unique, but as we approach year-end, a Roth IRA conversion for a portion of your retirement portfolio may be a strategy to explore a bit more.

A Roth IRA must meet a 5-year holding rule and occur after age 59 1/2 for the tax-free and penalty-free withdrawal of earnings. Tax-free and penalty-free withdrawals can also be taken under certain circumstances, such as the owner's death. The original Roth IRA owner is not required to take minimum annual withdrawals.

This post is for informational purposes only and is not a replacement for real-life advice, so make sure to consult a tax professional before moving forward.

#RothConversion #RothIRA

■ US Individual Income Tax: Tax Rates for Regular Tax: Highest Bracket
■ US Individual Income Tax: Tax Rates for Regular Tax: Lowest Bracket



Schedule directly from FMG

Using Charts in Your Posts is a Great Way to Grab Attention



Jeff Hurst, CPA · 2nd
President at Hurst Financial Consulting LLC

Follow ...

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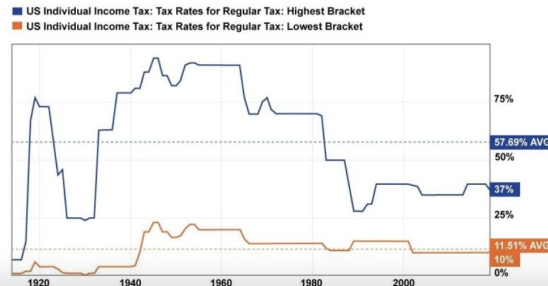
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#RothConversion #RothIRA





**FMG has a whole library of tax
related content you can automate**

A Helpful Distinction



Explaining how decisions may affect taxes is not the same as telling a client what tax action to take.

This tool stays firmly on the first side of that line.

What This Is (and Isn't)

This is not tax advice.

This is not filing guidance.

This is not replacing a CPA.

This is understanding the tax impact of investment decisions so avoidable issues don't get created.

This is valuable conversations with your clients about something they are already thinking about (and talking about with others) all the time.

Opportunity #1:

Demystifying the Tax Return

Most prospects don't really understand what they're looking at on their tax return.

The report helps translate:

- What the numbers mean
- Where income comes from
- Why certain totals look the way they do

Clarity builds confidence.



Opportunity #2:

Dividends and Interest

The report reveals:

- Total dividends earned
- Total interest earned
- Across all accounts

Not just the ones you manage.

This often uncovers:

- Hidden income
- Overlooked opportunities
- Better context for future conversations

Opportunity #3:

Future Projection Opportunity

Scenario Analysis allows:

- Filing Differences
- Roth Modeling
- QCD Structuring

Projected Taxes

Base Projection Total Lifetime Tax: \$18,586,581

Roth Projection Total Lifetime Tax: \$6,687,020

Projection Difference: \$11,899,561

This creates more informed conversations about timing and expectations.

The Tax Season Content Kit Is Coming Your Way!

Do It For Me Calendar | October

Monthly checklist

- Check out the content recommendations.
The default is to send emails to ALL contacts and social posts to LinkedIn. If you want to select a more targeted group, let us know in your email reply.
- Reply to the email "Approved" and we'll get started on scheduling your marketing for the month!

Key

- Email (E)
- Social media (S)
- Blog (B)
- FMG automation

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
25	26 S: Rosh Hashanah	27 E: 10 Mistakes Derail (Prospects Only)	28	29	30 S: Good Morning Routines	1 S: International Coffee Day
2	3 S: Breast Cancer Awareness Month	4 E: Will Your SS Check Be Taxed? B: Will Your SS Check Be Taxed?	5	6	7 Monthly Market Insights	8
9	10 E: Cybersecurity Month: 7 Steps to Protect Yourself	11 S: Cybersecurity Month: 7 Steps to Protect Yourself	12 B: Cybersecurity Month: 7 Steps to Protect Yourself	13	14	15
16	17	18	19 E: Charitable Giving Strategy	20 S: Interesting Financial Education	21	22
23	24 B: The Pros & Cons of ESG Investing	25	26 S: What is Something You Splurge On?	27 E: The Pros & Cons of ESG Investing	28	29
30	31 Halloween S: Happy Halloween					

Hello,

With continued coverage of banking issues and what The Federal Reserve is doing to help, your clients and prospects are likely looking to you for information. To help you reach out proactively, we wrote a short email to address the news and reiterate that you are available for those who would like to talk. We are happy to send this email out to your clients and prospects on your behalf.

For Your Review & Approval: [Fed Managing Banking Issues, Inflation](#)

Please reply to this email with one of the following:

1. **Email is approved as is. Send to all contacts!**
(We will schedule this email without changes. Note there may be a lag if it needs to be approved by your compliance team.)
2. **Content is approved with changes.**
(Let us know what text changes you would like for the email.)
3. **Content is not approved.**
(Nothing will be scheduled.)

Important Reminders:

- If you are not using ALL CONTACTS, please name the group(s) you would like us to email.
- If you have self-managed compliance, be sure you log into your **FMG** account to approve pending items so they are sent in a timely manner.
- Please note that if you do not reply to this email, we will not send anything.

**Want to see how FMG can
help you with all this in 2026?**

Book a 20-minute consult →

Questions? Marketing@fmgsuite.com

