

April 19, 2019



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Taxes Are Filed - What Next?

Hello,

Congratulations! You've completed your 2018 tax return, the first one after major changes to the U.S. Tax Code. Whether you got the refund you were expecting or found you had a balance owing, what you do after April 15th can have a positive effect on your overall financial health.

Doing your taxes and the organization of all your financial documents that it involves gives you a good overall picture of where you stand. The next step is to apply this knowledge across all aspects of your financial life. By taking control and actively engaging in the process, you create accountability for your financial life. You can better judge what years were better for you financially and how you rebounded from financial mistakes.

That's where I can help. Together we can review what you've organized and put a strategy in place that can anticipate change and continue to help work towards achieving your long-term goals. We'll then monitor progress every step of the way. That's where the magic of organization comes in.

Please feel free to share these articles with your family and friends, they are excellent conversation starters.



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April 15, 2019



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April 16, 2019



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