

Welcome back! Please review for helpful information,
and complete the important questionnaire on the back of this page.



IMPORTANT: If you applied for an IP PIN with the IRS please make sure the IP PIN you have is for the 2021 tax year. If it is not, please go to irs.gov/ippin, scroll down, and click on 'Get an IP PIN'. Log in to the account you already created and follow the instructions to obtain a current IP PIN. You will NOT need to go through the rigorous identity verification process again, but you do need the current IP PIN to file your 2021 tax return.

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Our Continued Alliance with SA Piggush Financial Consultants Increases Financial Planning Options.

We strive to offer the highest quality financial services throughout the year and are proud to be your trusted accountants and advisors. Six years ago, we formed a strategic alliance with SA Piggush Financial Consultants, who specialize in wealth and retirement planning. Through our partnership with SA Piggush, we deliver comprehensive wealth and retirement management. Their highly credentialed team will guide you through their specific planning process to ensure you have a solid plan and are taking advantage of all available advanced planning strategies to maximize your plan. For clients who utilize their services, together, we can create a well-organized and unified advisory team for you!

The advisors at SA Piggush Financial Consultants are registered representatives with, and securities are offered through LPL Financial, Member FINRA/SIPC. Investment advice offered through Level Four Advisory Services, a registered investment advisor. Level Four Advisory Services and SA Piggush Financial Consultants are separate entities from LPL Financial. These entities are not affiliated with Geoffrey, Johns & Associates LLC, and you may choose any qualified professional to provide the financial services described.

Helpful Information:

- Remember to provide us with the exact amount of **Advance Child Tax Credit** you received, if any, in 2021.
- Also, please provide us with the amount of your **3rd Economic Stimulus Payment**, issued in March 2021.
- **Are You Having Enough Withheld?** – Similar to 2020, many taxpayers will have lower refunds or may even owe tax because of the new Form. Please visit the IRS website for an interactive calculator (www.irs.gov/individual/tax-withholding-estimator). We are available to review with you if you are adversely impacted by the new withholding rules.
- **Contribution to Your Retirement Plan** – Consider increasing contributions to your 401(k) plan. Also, you have until April 15th, 2022, to make deductible contributions to an IRA – **if you are eligible**. Lastly, if you are self-employed and haven't done so yet, consider setting up a self-employed retirement plan.
- **Charity Planning** – If you are at least 70½ consider making charitable contributions directly from your IRA.
- **Bright Start 529** – If you live in Illinois and you contribute to a Bright Start 529 plan to be used in Illinois, your contributions are tax deductible. To be deductible for a calendar year you must make the contributions before December 31st of that year. Withdrawals must only be made for qualifying purchases.

Tips on How to Prepare for Your Tax Meeting:

- q Once you begin to receive your Important Tax Information, designate a place to keep it until your tax appointment. The biggest setback when filing taxes is not having all the necessary documents.
- q Self-employed individuals – please bring a summary of your income and expenses.
- q Stock Transaction Reporting Form Reminder – If you or your broker sold stocks, bonds, or mutual funds we are required to complete additional forms with your tax return. Prior to your tax appointment please confirm that you have complete cost basis information for all stock, bond, or mutual fund sales.
- q The IRS requires that you keep written documentation for all charitable contributions.



Thank you!