



Mentor RIA Consulting

Allowing you to focus on what you do best

Year-End Planning Opportunities

As we near the end of 2014, it is time to remind ourselves to remember to finalize our income and estate tax planning for 2014. Possibly more importantly, it also is time to begin planning for 2015, taking into consideration the tax law changes and developments that will affect us along with those changes in our own lives that will require planning adjustments.

This time of year is a real opportunity to take control of our financial situation because there are factors we can control and it is not necessary or advisable to let things slide. You can make a difference! Clients will benefit from taking the time to do an analysis of their choices and make an informed decision with the assistance of their advisers.

As a starting point, well-known to many of us, it is useful to evaluate the timing of both our income and deductions, ensuring that we maximize whichever of the two makes the most sense given our current tax situations and expected changes in 2015.

For more, contact us at www.mentorriac.com or e-mail us at info@mentorriac.com