



HOW MUCH DO YOU KNOW ABOUT YOUR TAXES?

Are you sure you're taking advantage of every legal deduction, credit, loophole, and strategy the Tax Code offers you, your business, and your investments? Or are you missing opportunities that can cost you thousands in wasted tax? Take this survey, and together, we'll determine how valuable our tax-planning service might be!

Statement	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
I have a "rock-solid" tax plan that takes advantage of every opportunity the law allows.					
We regularly discuss ideas for saving tax.					
Business					
I understand why my business is organized the way it is (e.g., proprietorship, partnership, S-corp, etc.)					
My business structure complements my future exit strategy (e.g., sale, transfer to my partners, transfer to my children).					
Benefits					
I have thoroughly evaluated my business's benefit plans and how they work together.					
My retirement plan meets my needs for current tax breaks <i>and</i> long-term investment growth.					
I have a plan to navigate the "Obamacare" rules.					
My employees understand the value of their benefits.					
Investments					
I understand how each of my investments is taxed and how it contributes to my overall portfolio tax burden.					
I have carefully considered which investments belong in taxable accounts and which investments belong in tax-advantaged accounts.					
I have a plan for maximizing the value of any long-term capital loss carryforwards.					
I understand the rules governing "passive" income and losses and have a plan to avoid "suspended" losses					
Charitable					
I understand how to maximize the value of my cash <i>and</i> non-cash charitable contributions.					