

Tax Packages for Your High Value Clients

A simple, but welcome value-add.

Years ago, my own personal Financial Advisor sent me a very simple letter along with a plastic business size folder to store all of my incoming tax slips and information. WOW - here I am eight years later STILL using this durable, plastic envelope! Yes, as the various tax slips and related information come to me throughout the year, I simply put them in this envelope and forget about them until Tax Time. Exhale.

This simple item is a major stress-reducer for me because in the past, I would often forget where I put the various slips and information, which led me to having to request duplicates. This is not only time-consuming but also frustrating for all involved.

If this idea is something you believe would add value to your clients - let us get it done for the very next tax season! Refer to the **sample letter** on page 2 which is all that is required along with the Tax Envelope. However, if you can include additional information related to **tax-slip deadlines** (which many firms have assembled and have ready to go), we encourage you to do so.

Tax Envelopes

You may have access to some awesome, already-branded **plastic envelopes** at your firm, and if not, there are many options available from office stores such as Staples. These can be purchased in a variety of colors and styles.

You'll want to make sure you choose one that is at least 8.5 by eleven" in size. I also strongly encourage you add a quality label with the logo and the client's name - remember the Tax Envelopes are NOT intended for all your clients, just your VIPs.



Extra Value-Add

You may also want to include a piece outlining **Important Tax Deadlines & Dates**.

Some teams go above and beyond for their high-value clients and include **Gain/Loss Report** and other tax-related information they know will be requested by the client and/or their accountant, but this is an extra step, and not mandatory.