Tax Package Cover Letter

*Along with this Cover Letter, include an oversized plastic pouch, which includes a label affixed to it with the client’s name and your logo. Optional: You may also wish to include a schedule of tax-slip deadlines and/or Gain-Loss Reporting.*

November 19, 2021

Name

Address

Address

Dear [Client],

Yes, it is official – it is tax time again.

It is Always About Simplification – For You

As you know, we are here to help you simplify, organize, and coordinate *all* aspects of your Wealth Management – which most certainly includes Tax Planning. As such, we are sending along a reusable Tax Pocket which you can use throughout the year to store the various tax slips and related tax information you receive so it is readily accessible when you need it - at tax time.

Do not let the simplicity of this fool you – most of us have at some point lost tax slips and information and had to go through the frustration of requesting and waiting for duplicates. Those days are over.

It is Also About Timing

We have also included an outline of deadlines related to the various tax slips you may receive this time of year, which we hope you find helpful.

Here to Serve You

We hope this Tax Package makes your life a little easier during tax season.

As always, feel free to contact us if you have any questions and we will be more than happy to assist.

Sincerely,

Advisor’s Name

Advisor’s Title