

# 2024

# Tax Planning Guide

Now Available

This popular 32-page guide for individuals and business owners provides an overview of current tax legislation. Use this guide to inform your clients and prospects about tax changes that might impact their financial situation. There may be new tax-saving opportunities that come to light. The information in this booklet will help clients to be better prepared when they meet with you to file taxes.

## Build Clientele

Consider mailing it to prospects, too! You can personalize each booklet with your contact information to promote your brand and reputation as the tax professional who does more for clients.

## Notable Tax Changes Include:

- The standard deduction and estate tax exclusion amounts increased
- Retirement plan contribution and income limits increased
- The Required Minimum Distributions (RMDs) start date increased to age 73
- Roth 401(k) distributions will not have RMDs similar to non-Roth accounts
- Excess 529 plan funds may be rolled over tax-free to a Roth IRA for the plan beneficiary



Online Edition!



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At LTM Client Marketing, we create customized communications designed to help our clients in the insurance, financial services, and tax industries to maintain top-of-mind awareness among their customers and prospects. Our personalized messages can help you to build lasting relationships with your customers and build your brand as a tax professional people can trust, which can also boost prospecting success.

## Our Team



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