

**APPROVED**

*By Kendrea Lopez at 10:52 am, Sep 27, 2023*

**2023  
2024**

# **TAX PLANNING GUIDE**

YEAR-ROUND STRATEGIES  
TO MAKE THE TAX LAWS WORK FOR YOU



**Schwan**  
Financial Group

401 Vivian Street South, Aberdeen SD 57401  
800.456.1349 • [www.SchwanFinancial.com](http://www.SchwanFinancial.com)

# FORWARD-THINKING TAX PLANNING

Our proactive approach allows you to make decisions all year long to keep you in control. We continuously monitor changing economic conditions and tax laws and implement them into your plan. Our value-based engagement platform creates an open relationship so our clients can call us when they have questions.

1

## IN-DEPTH HOLISTIC ANALYSIS

- Analysis of tax returns, legal and financial documents
- Focus on all areas of Tax - **Federal & State Income Taxes, Social Security, Estate and Gift Tax**
- Retirement & Employee Benefits & Entity Structure

2

## PLAN DEVELOPMENT

- **Tax Planning vs Tax Preparation**
- Optimize Personal, Business & Charitable Tax Situation
- Written options provide clarity to make decisions

3

## IMPLEMENTATION + MANAGEMENT

- **Integrated approach with our professional alliances and your advisors**
- Ongoing planning & alignment with your Master Plan™

## THE PLANNING PRIORITY PYRAMID™



# A National Multifamily Private Office



We Help People  
Understand, Grow, Secure, Enjoy and Distribute their Legacy

## CLARITY

### Planning Focused on You

We are known for giving our clients a good listening to. After gaining a clear picture of your current situation, we take the time to explore and envision your ideal financial future. We ask the right questions, identify potential barriers and map out the best course to reach your desired future state.

## CONFIDENCE

### Comprehensive Implementation

We believe in a holistic approach. The synergy and flexibility of having all pieces of your financial puzzle in one place is invaluable. This is why we offer a smooth experience that comes from working with an expert team with deep knowledge across a variety of disciplines. In collaboration with our internal team and any additional outside trusted advisors needed, we ensure that your ideal plan is seamlessly executed.

## CAPABILITY

### Tailored Ongoing Management

The implementation of the Master Plan is just the beginning of our ongoing relationship with our clients. We utilize multiple tools to keep our clients informed, engaged and in control. Our proactive approach includes regularly scheduled meetings and reviews, plus a monthly calendar system that clearly communicates informational and actionable items of the plan. Throughout this phase, we remain an eager and readily available resource.



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