**Lexington Office**
2704 Old Rosebud Road, Suite 180
Lexington, KY 40509
**P:** 859-309-0349 **F:** 859-309-0941
***Thefamilywealthgroup.com***

January 7, 2025

Thank you for the trust you put into Family Wealth Group and FWG Investments. We appreciate you and your business.

We look forward to continuing to serve you and your family. With the onset of the New Year, it also means that our Federal and State Income Tax filings are fast approaching. The tax filing deadline for the 2024 tax year is April 15, 2025.

As clients of FWG Investments, LLC; you can utilize the services of Chambers CPA to file your personal federal and state income taxes. The tax preparation services with Chambers CPA are a part of the services provided under our Investment Advisory Management Agreement which includes your Fidelity and/or Lincoln Level Advantage accounts where a management fee is paid. **These tax preparation services are only available to our clients with securities accounts (Fidelity & Lincoln Level Advantage) paying a management fee;** and include the preparation and filing of standard individual federal and state income tax returns. If you have business or farm schedules/returns or other non-standard returns, there may be an additional charge from Chambers CPA.

To ensure that your 2024 taxes are filed by the April 15th deadline, your complete tax preparation information needs to be submitted to Chambers CPA's office no later than Friday, March 7, 2025. You can drop off your information at their office located at 1795 Alysheba Way, Suite 6103, Lexington or at any of our office locations; and we will deliver it to Mark's office for you. If your information is not complete or is not at Mark's office by Friday, March 7, 2025, an extension will be filed. If you need to meet with Chambers CPA, please call their office directly to schedule a meeting. Their time will be limited during this tax season to concentrate on completing the returns timely. Chambers CPA will reach out to you directly via email if there is any missing information or outstanding questions. It is your responsibility to respond back to them in a timely manner.

When your tax returns are completed, Chambers CPA will notify you and send your tax returns by **email to you using the email address you provide**. You may choose to pick up a copy from Chambers CPA; FWG Investments will not be able to pick up your returns for you.

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In working with Chambers CPA, we have developed a ***TAX PREPARATION CHECKLIST*** which is included in this packet of information to assist you in your preparation. Also, please make sure you complete the ***CHAMBERS CLIENT SHEET***, even if you have utilized their services previously, this ensures that Chambers CPA has your most updated information. This will help ensure all information is provided to the Chambers CPA Team and the government.

We look forward to seeing you soon and best wishes for a successful and fulfilling year! Should you have any questions, please feel free to call our office.

Donald Bentley
Financial Advisor/Owner

Jeff Sheppard
Financial Advisor/Owner

# TAX PREPARATION CHECKLIST

**INCOME**

- W2s (Income earned from work)
- Social Security (SSA-1099)
- Pensions, IRAs, Retirement (1099 R)
- Interest Income (1099 Int)
- Dividends (1099 Div)
- Gains & Losses (1099 B)
- 1099 Combined (i.e. Fidelity will combine the above Interest, Dividends, & Gains/Losses into one form)

- **Fidelity 2024 Tax Form Delivery Calendar—Estimated mailing dates**
  - Key online activation dates for high-volume tax forms*
  - Retirement Tax Forms (5498, 1099-R): January 17th
  - 1099 1st Mailing: January 25th
  - 1099 2nd Mailing, Info Only, and Preliminary Tax Reporting Statement: February 8th
  - 1099 3rd Mailing: February 22th
  - 1099 4th Mailing: March 7th

  **Dates are subject to change due to unforeseen circumstances. For clients set to receive their form(s) by mail, the form will generally mail within 5 business days of the online activation date.*

**OTHER POSSIBLE INCOME**

- Rental Income
- Self-Employment Income
- Farm Income
- Gambling Income (W2G)

**OTHER POSSIBLE ITEMS**

- Student Loan Interest (1098 E)
- Tuition (1098 T)
- Traditional IRA/Roth IRA Contributions
- Roth Conversions (is not noted on forms so need to make sure told was a conversion)
- Qualified Charitable Contributions (QCD) No form so client has to make sure to inform CPA
- 5498 IRA Statement—if you are making IRA contributions or conversions

**ITEMIZED DEDUCTION ITEMS**

- Medical & Dental (very few qualify, often they must be a significant amount)
- Property Taxes (home, vehicles, boats, etc.)
- Mortgage Interest (Form 1098)
- Charitable Cash contributions (if QCD, need to be noted separately)
- Non-cash contributions (Physical items donated to charitable organizations)

# CHAMBERS CPA, LLC
# CLIENT INFORMATION—FWG Investments, LLC

TODAY'S DATE________________

NAME: ______________________________________________________ DATE OF BIRTH: ______________

SOCIAL SECURITY #:_____________________________ OCCUPATION: _______________________________

ADDRESS: ________________________________________________________________________________

CITY:______________________________________________________STATE:________ZIP:______________

CONTACT PHONE #:__________________________EMAIL:__________________________________________

**SPOUSE INFORMATION IF APPLICABLE:**

SPOUSE NAME:_______________________________________________ DATE OF BIRTH:________________

SOCIAL SECURITY #:_______________________________ SPOUSE OCCUPATION:________________________

ADDRESS: (If Different From Above)________________________________________________________________

CITY:______________________________________________________STATE:_________ZIP:______________

CONTACT PHONE #:__________________________EMAIL:__________________________________________

**DEPENDENT(S) INFORMATION:**

| NAME | RELATIONSHIP | DOB | SOCIAL SECURITY # |
|---|---|---|---|
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**DIRECT DEPOSIT INFORMATION: If you want your transaction electronically, please complete the information below:**

| NAME OF BANK | CHECKING OR SAVINGS | ROUTING # | ACCOUNT # |
|---|---|---|---|
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