Critical Transitions Wealth Advisors

Tax Season Essentials

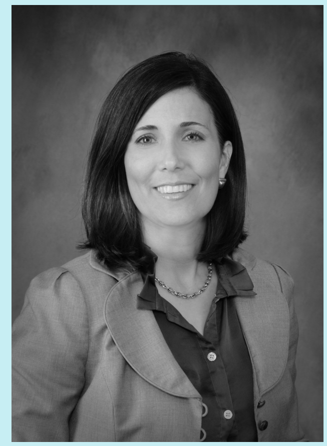
Tax season is here, and we want to help you be prepared. Below you'll find tax deadlines and important information to ensure you have a successful tax season.

During the 2019 tax season, LPL will mail 1099 consolidated statements in four waves (similar to other major financial firms) to meet all IRS deadlines, reduce errors, and cut down on the need to mail corrected forms.

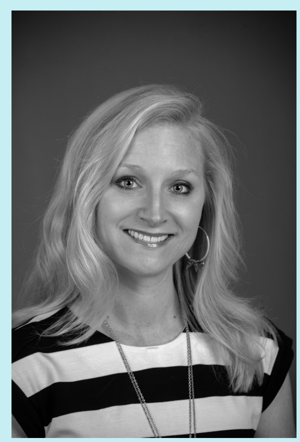
- 1/31/2019 - 1099-R Form Mailing/First Wave of 1099 Consolidated Forms Mailing - Already out
- 2/15/2019 - Second Wave of 1099 Consolidated Forms Mailing
- 3/1/2019 - Third Wave of 1099 Consolidated Forms Mailing
- 3/15/2019 - Fourth Wave of 1099 Consolidated Forms Mailing
- 4/15/2019 - IRS Tax Filing or Extension Request Deadline

Even with LPL's staggered mailing process, delayed reporting and reclassification can sometimes occur, which is outside of our control. For the most part—with rare exceptions— corrected 1099s are triggered by updates from security issuers after the IRS deadline. If you need to file an amended tax return, be sure to discuss the situation with your tax advisor prior to refiling so you can determine the best course of action based on your individual circumstances.

I hope this information is helpful! Please contact me if you have any questions.



Stephanie Y. Vokral
AIF®, CFP®, CDFA®



Jessie R. Faircloth
Director of Client Relations

February 28th is National Fiduciary Day

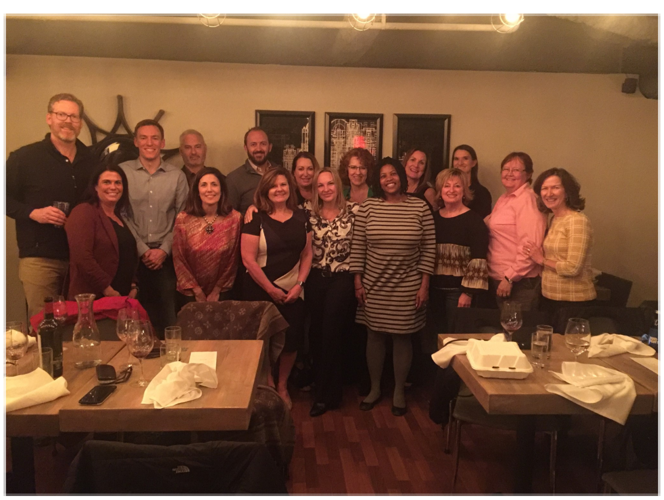
Working together to help you achieve your financial goals is incredibly rewarding. I take my responsibilities to adhere to the highest standards of ethical and professional conduct very seriously, which is why I am proud to be an Accredited Investment Fiduciary® Designee. The AIF® Designation is more than just an acronym. It's a symbol that I will always put your best interests first.

Fi360 NATIONAL FIDUCIARY DAY

Feb. 28 is National Fiduciary Day, which was established to acknowledge the importance of fiduciary excellence in our industry. In honor of this celebration, I am taking the opportunity to simply say thank you for your partnership. I strive for fiduciary excellence on your behalf every day and am excited to work with you well into the future.

CDFA® Training in Arizona

Stephanie recently attended training in Arizona for her Certified Divorce Financial Analyst® practitioner designation. This designation gives her specialized training in the area of divorce and the ability to assist families with creative financial solutions to potentially impact children more positively and for couples to keep more money in their own pockets. CDFA® practitioners attended from all across the country.



Spring Social

There has been a change to the date of our Spring event - It will now be the evening of April 15th at Blue Marlin in Columbia, SC. Invitation to follow, and we hope to see you there!

Office Hours

Our office will be closed Monday, February 18th in honor of President's Day.

Need a speaker for your church, group, or club? Stephanie speaks regularly on a variety of financial topics you will enjoy and find personal applications to benefit you and your colleagues. Call Jessie today to schedule at (803) 749-7012.

CWTA

critical transitions

WEALTH ADVISORS

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