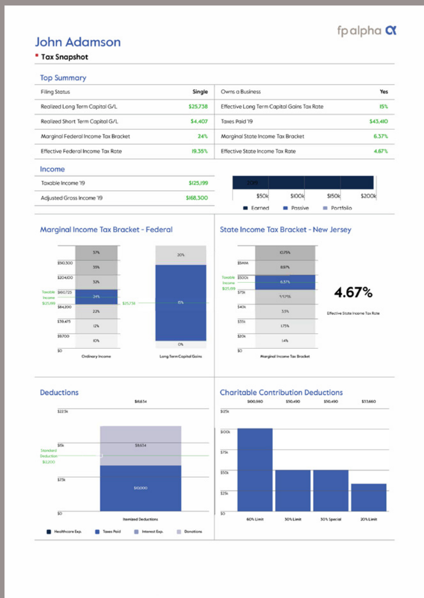


FP Alpha's
Tax Snapshot

Providing advisors with an immediate summary of a client's current tax return that complements the planning opportunities identified by FP Alpha.

As an advisor, client-engagement is key to your success—so are the many behind-the-scenes things you do to help your clients reach their financial goals.

That's why we built FP Alpha's **Tax Snapshot**—a way for you to efficiently capture the most relevant information from your client's tax returns and put it into a dynamic, client engagement document that complements the planning opportunities identified by FP Alpha.

It's as simple as 1, 2, 3.

First, You

1. **Upload** your client's tax return, and let FP Alpha take care of the rest.

Then, FP Alpha

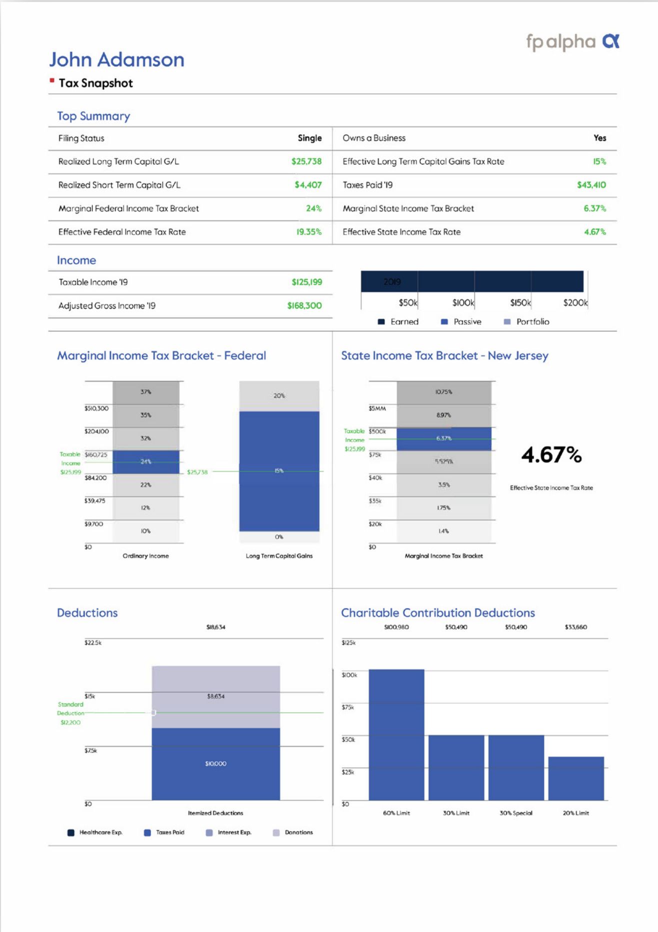
2. **Generates** a client engagement document that identifies 16 key tax areas from their current tax return.

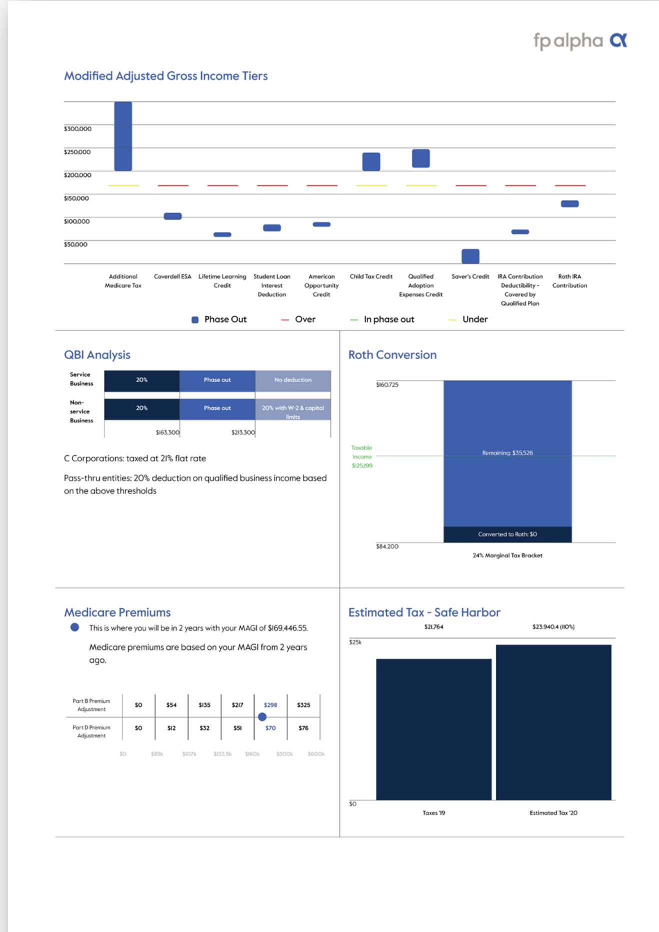
&

3. **Provides** a list of actionable opportunities to reduce your client's tax burden.

This unique deliverable provides details on 16 key tax areas, including state-specific information, Roth analysis, Charitable deductions and QBI analysis.

From MAGI tiers and Roth conversions to state tax credits and future legislation, including the Biden Tax Proposal, this report enables you to add instant value for your most simplistic client case all the way to your complex, ultra-high-net-worth business owners.





Key Tax Areas Identified

Realized Capital Gains & Losses | Marginal & Effective Federal Taxes | Marginal & Effective State Taxes
Income Source Breakdown | MAGI Tiers | QBI Analysis | Roth Conversion Optimization | State Tax Credits
Biden's Tax Proposal Summary | Deductions | Charitable Contributions | Medicare Premiums
Estimated Tax – Safe Harbor | LTC Deduction Limits | Health Savings Accounts | Social Security

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While there are advisors out there who spend a lot of time going through their clients' taxes to gather the relevant information—you don't have to be one of them.

Sign up for FP Alpha's **Tax Snapshot** and let the technology efficiently collect the information for you so that you can focus on activities that will help you grow your business.

To schedule your demo, contact Josh Grossberg at: 212-796-8738 | jgrossberg@fpalpha.com

To learn more about the FP Alpha platform and it's other offerings, including estate and insurance planning, contact Josh or visit www.fpalpha.com

fp alpha