

TAX PLANNING SERVICES



TAX FILING & PLANNING WITH JUMET FINANCIAL TAX SERVICES

At Jumet Financial Tax Services, we understand that financial planning and tax planning go hand in hand. That is why we have elected to include tax filing and planning in our service offering. This gives clients the benefit of a "one stop shop", which helps limit the complications that can be brought about with tax filing. While taxes are nobody's favorite, our goal is to take the burden off of the client, and give them a smooth process that allows their goals to be analyzed both from a financial and tax prospective. Whether you are planning for your future with Jumet Financial, or analyzing your tax situation with Jumet Financial Tax Serves, we are here to help you every step of the way.

TAX FILING SERVICES

At Jumet Financial Tax Services, we believe filing taxes should be as simple as possible for the client. In order to achieve that, we offer the following:

- Tax Document Management
- Conversion Information Management
- Year End Tax Driver Assessment
- W4 adjustments and Quarterly Payments
- Liasson to existing Tax Advisor
- Assisting in managing State and IRS tax notices
- Running mid year and year end tax projections / preliminary tax filings
- Income and Estate Taxes
- Retiree Taxes and non-retiree tax management
- Tax Filings (Federal and State)
- Business taxes and planning

YEAR-ROUND SUPPORT

Jumet Financial Tax Services support does not stop once you file. We provide support all year long to make sure you are staying on track with your tax situation. No last-minute stress—just thoughtful planning to keep you ready for whatever comes next.

TAILORED TO YOU

We know that everyone's tax and financial situation can be different, and they should not be analyzed separately. That is why we take the time to understand your unique needs. Whether you are getting married, having children, or starting your own business, we will work with you through your tax circumstances.

WHY JUMET FINANCIAL?

We bring a fresh, modern approach to tax services, combining the latest tools with a personal touch. We are here to handle the details so you can focus on what is important to you!

www.jumetfinancial.com
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