

April/May 2021 Surge Letter

Good afternoon clients of Capital City Wealth Management,

It's that time of year again!

We are excited to catch up on your retirement plans, both personally and financially.

In preparation for our appointment, we would like to review your tax returns.

[Click here to securely upload your tax return](#)

If you have difficulty submitting your return or scheduling your appointment online, [click here to watch this quick video tutorial from Benjamin](#).

We have tax review appointments available through the end of May, so if you are taking advantage of the extended tax filing deadline (May 17th) simply schedule your appointment for later in May.

In addition to reviewing your income taxes with you, we want to touch on a few other important financial topics:

- CARES Act deductible charitable donations for non-itemizers for 2020 and increased amounts for 2021 joint filers
- **For retired clients not yet 65** - we will run calculations to see if the new Premium Assistance Tax Credits from the recent American Rescue Plan legislation will be available to you.
- Retirement income guardrails
- Review your portfolio strategy, in light of the worst market downturn in recent memory

As you can see, we have lots to discuss!

Due to the continued caution around Covid - we will continue to meet with clients virtually over Zoom.

[Click here to schedule your appointment](#)