

JOHN HARMAN CPA PLLC

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VOTED BEST ACCOUNTANT
IN
MCKINNEY, TX
2009 & 2010

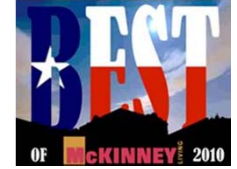
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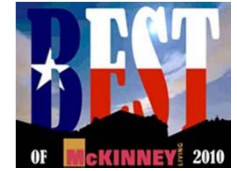
Resources



- IRS – VITA Program
 - ✦ Free service sponsored by IRS
- AARP – Help on site or phone calls
- Free Filing through IRS...simple returns
- IRS site – www.IRS.Gov
- Google – My Favorite☺ (type in “free tax help” or specific question)



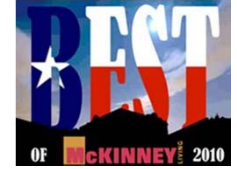
Professional Help



- Do you save money by doing it yourself?
 - ✦ Tax Return by a CPA starts at \$250+
- Or does it cost you?
 - ✦ Time – how valuable is your time. Reading instructions, calculating return
 - ✦ Money – Did you miss a deduction?
- Secure Backup and Peace of Mind
 - ✦ Safe backup of your tax information
 - ✦ Peace of Mind in having a professional that knows your tax situation and can assist your surviving spouse



Tax Strategies



- Determine your goals and ability to meet them
- I have found that whatever your realistic goals are, there is probably a financial vehicle or strategy to meet!
- Do you need
 - ✦ Tax Free Income in retirement
 - ✦ Guaranteed income for your life
 - ✦ Passing Estate income to Children when they are Beneficiaries
 - ✦ Insurance proceeds are tax exempt