

Hi XX,

With the final tax deadline approaching on May 17, I wanted to see if you'd be interested in connecting with Rob Crigler, Managing Director at Mariner Wealth Advisors, who can discuss changing tax laws and how to best approach filing in a post-COVID world.

Some important / little known considerations he can discuss include:

- The Federal tax forms haven't been updated to reflect an exclusion for up to \$10,200 of unemployment from income in 2020 when joint filers make less than \$150,000.
- The CARES Act allows charitable contributions made to qualified organizations in cash to offset taxable income by 100% for 2020, or, taxpayers can eliminate all taxable income by making a donation of the same amount.
 - It's important to note that this reverts back in 2021.
- Those that temporarily relocated need to review the laws of the state they left. For instance, New York still requires tax payments if the employer didn't relocate and it's assumed the taxpayer still works there.

Please let me know if you're interested in a conversation with Rob.

Best,
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