

2026 TAX PLANNING GUIDE

This popular 32-page guide for individuals and business owners provides an overview of current tax legislation. Use this guide to inform your clients and prospects about tax changes that might impact their financial situation. There may be new tax-saving opportunities that come to light. The information in this booklet will help clients to be better prepared when they meet with you to file taxes.

BUILD CLIENTELE

Consider mailing it to prospects, too! You can personalize each booklet with your contact information to promote your brand and reputation as the tax professional who does more for clients.

NOTABLE TAX CHANGES INCLUDE:

- The standard deduction and estate tax exclusion amounts increased
- Increase in dependent care assistance program
- Raises SALT itemized deduction cap to \$40,000
- Permanently increases bonus depreciation percentage to 100% for property acquired after January 19, 2025



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