



LYNCO

Financial & Tax Services, Inc.

Lynn A. Schmidt, EA – Financial Advisor & Tax Strategist

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www.TaxPlannerFL.com
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My firm provides comprehensive financial services that are tailored to our client's unique personalities, needs, and situations. Specializing in Tax-Smart strategies, I help you assess your goals, understand your priorities, and develop a plan for your financial future. My approach is to utilize "Tax-Smart" financial & tax planning strategies and help you pursue the life you and your family deserve. I believe that every financial decision has potential tax implications. You owe it to yourself to work with a tax & financial professional who understands how those implications affect you and your family's financial future.

Offering exceptional service and a holistic approach is the premise behind the services offered at Lynco Financial & Tax Services, Inc. Our mutual goal is to help you "Keep more of what you make" and "Save more of what you keep."

Comprehensive Financial & Tax Services Lynn A. Schmidt, EA – Financial Advisor & Tax Strategist

Investment Products

- 401(k) Plans & Rollovers
- 403(b) Plan Rollovers
- 457 Plan Rollovers
- 529 College Plans & Educational IRAs
- Mutual Funds & Variable Annuities
- Pension & Profit-Sharing Plans
- IRAs (Rollover, Roth, Simple, SEP, Traditional)

Insurance Products

- Annuities – Fixed & Indexed (CD Alternatives)
- Health Savings Accounts
- Life Insurance—All Types
- Long—Term Care & Disability
- Long—Term Care Alternative Strategies

Strategic Planning Services

Business Entity Strategic Planning
Cash Flow & Debt Management
Employment Changes
Estate Planning
Investments & Insurance Analysis
Marriage/Divorce Tax Planning
Tax Planning for Retirement

Tax Preparation & Tax Planning/Tax Reduction Strategies

Advanced Tax Planning Strategies to Maximize After-Tax Savings
Multi-State Tax Returns
Real Estate & Rental Property Owners - Tax Planning & Preparation
Self-Employed Tax Planning Strategies
Small Business Tax Planning & Tax Preparation
Tax Returns: Individual, Partnership, Corporations, Sub-S Corps.
Tax Returns: LLC, Trust, Estate & Gift Tax

Tax-Smart Planning Strategies

Calculating and planning for annual Required Minimum Distributions (RMDs)
Retirement Plans – which plan(s) work best for you? – a personal analysis
Social Security planning strategies – Take it now, or take it later? Which is best for you?
Wealth Management – planning for growth, planning for change, and strategic preservation planning

Bookkeeping & Accounting

- Financial Statement Review & Analysis
- Bookkeeping— Quarterly or Semi-Annual Reviews – Strategic Tax Planning & Maintenance plans available

IRS Representation

- IRS & State Related Audits
- IRS Debt Payment Plans
- Offers-In-Compromise
- Assistance with Identity Theft Issues