



SAMPLETON FAMILY

2022 TAX LETTER

As a courtesy to you, we'd like to provide the following summary of our mutual client(s)' investment accounts, anticipated tax forms, and any transactions that may have tax implications. We're also happy to directly provide you with 1099s from the accounts we manage, with the client(s)' permission.

Please don't hesitate to reach out with any questions at all. We're all hands on deck this tax season, so we can help! You may find information about how we work with our clients at www.planningforgood.co.

TAX DOCUMENTS

We know of the following income sources and accounts, for which we expect a corresponding tax document.

Account Description	Expected Tax Document
Nonqualified managed account ending in 1234 with AssetMark	1099 Consolidated
SEP IRA managed account ending 4321 with Cambridge Advisors	Form 5498
Traditional IRA account ending 2345 with AssetMark	Forms 1099-R and 5498
Non-qualified annuity, contract ending 3456 with Nationwide	Form 5498

CONTRIBUTIONS TO TRADITIONAL/ROTH IRAS

Contributions were made to Traditional IRAs and/or Roth IRAs.

We are aware of the following contributions:

Description	Amount
12/31/2022 - 2022 Total Year SEP Contribution	\$6,572.00

ROTH CONVERSIONS

A Roth conversion was completed during the year.

We are aware of the following Roth conversions:

Description	Amount
7/21/2022 - From Traditional IRA account # ending 2345 with AssetMark	\$6,000.00

DISCLAIMER

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