



As spring approaches, tax season offers an important opportunity to pause, review, and ensure that each element of your financial life is working together as effectively as possible. With recent legislative changes and evolving tax considerations, we've included several timely resources in this edition of our newsletter to help you stay informed and prepared.

You'll find insights on how tax planning strategies may be shifting in light of the recently passed One Big Beautiful Bill, along with an overview of a new provision allowing up to \$10,000 of certain new car loan interest to be tax deductible. We have also included six practical strategies that may help reduce your overall tax liability this year.

To make the process as seamless as possible, we've provided a direct link to access your tax documents and complete forms through DocuSign. Taking advantage of these digital tools can help streamline the documentation process and keep everything organized throughout the season.

In addition, we've recently updated our website with new resources designed to support clients at every stage of their financial journey. We invite you to explore these materials and would greatly value your feedback. Our goal is to ensure the information and tools we provide continue to be meaningful, relevant, and helpful to you.

We wish you a wonderful start to the spring season. As always, if you have any questions, concerns, or would like to discuss any aspect of your financial plan, please don't hesitate to reach out. We're here to help.

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Named Forbes Best-In-State Wealth Management Teams 2023-2026

Source: Forbes.com (Awarded 2023-2026). Data compiled by SHOOK Research LLC based on 12-month time period concluding in March of year prior to the issuance of the award.
[Awards Disclosures](#)

Insights



Tax Season 2026: Planning After OBBA

How could the One Big Beautiful Bill Act shape your taxes and household finances? Top thought leaders share insights.

[Learn more](#)



Interest on new car loans is now tax deductible up to \$10,000

or the 2025 tax year, eligible U.S. taxpayers can [deduct up to \\$10,000](#) in auto loan interest under a temporary provision enacted as part of President Donald Trump's [One Big Beautiful Bill Act](#).

[Learn more](#)



Uncover 6 Ways to Reduce Your Tax Bill

Examining your tax return may reveal opportunities to save money hidden between its lines. You may be surprised by what you find.

[Learn More](#)

Accessing Tax Documents and DocuSign

[Learn More](#)

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