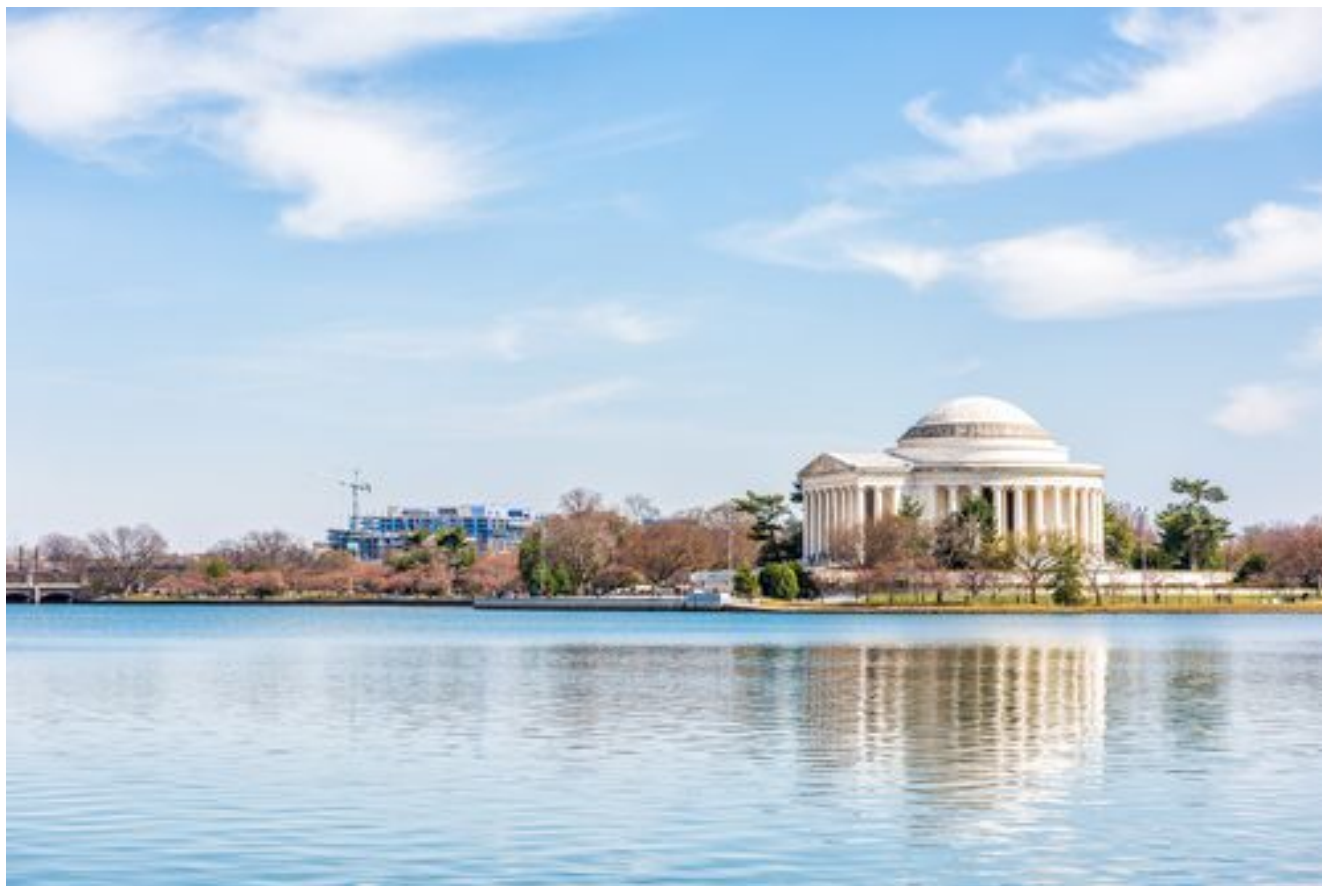


LUCAS, MORELAND and MASTBROOK, INC.

Weekly Update



Tax Update

The **Internal Revenue Service (IRS)** raised the stakes for those who underpay their taxes by ratcheting up the interest penalty on **estimated tax underpayments** to **8%**. The IRS indicated that the interest rate penalty is determined every quarter. **The Fourth Quarter 2023 Estimated Tax payment deadline is 16 January 2024.**

We invoice at our hourly rate for all professional time to include Tax Planning, Tax Projections, Retirement and Estate Planning, Bookkeeping, and Tax Authority Correspondence. With increasingly complex tax laws and understaffed tax agencies, tax correspondence is quid pro quo.

For guidance protecting your assets, request a Portfolio, Estate, Trust, or Retirement review. Vince is a CPA, Former AICPA Instructor, RIA, and Licensed Life Agent. He can help you manage your personal and business fiscal interests. If you wish to or made a Roth conversion, you

should see Vince for his unique Roth Conversion Asset Recovery Plan.

The information provided herein is for education only. It is not a recommendation to buy or sell any security, make any investment, or pursue a particular tax strategy. Current viewpoints are subject to change.

Reach us if you want a hard copy, printed Tax Organizer. To save considerable time, trees, and postage the preferred document delivery method is via your Portal. We soon begin delivery of the 2023 Tax Organizer and Engagement Letter.

Thank you for your referrals!

Vince Lucas, CPA
President
LMM, Inc.
LBA, CPA and LGK, CPA

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Thank you for referring family and friends!

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Thank you for your patience as our entire
Team continues their tireless work on your
behalf.

VINCE LUCAS | PRESIDENT