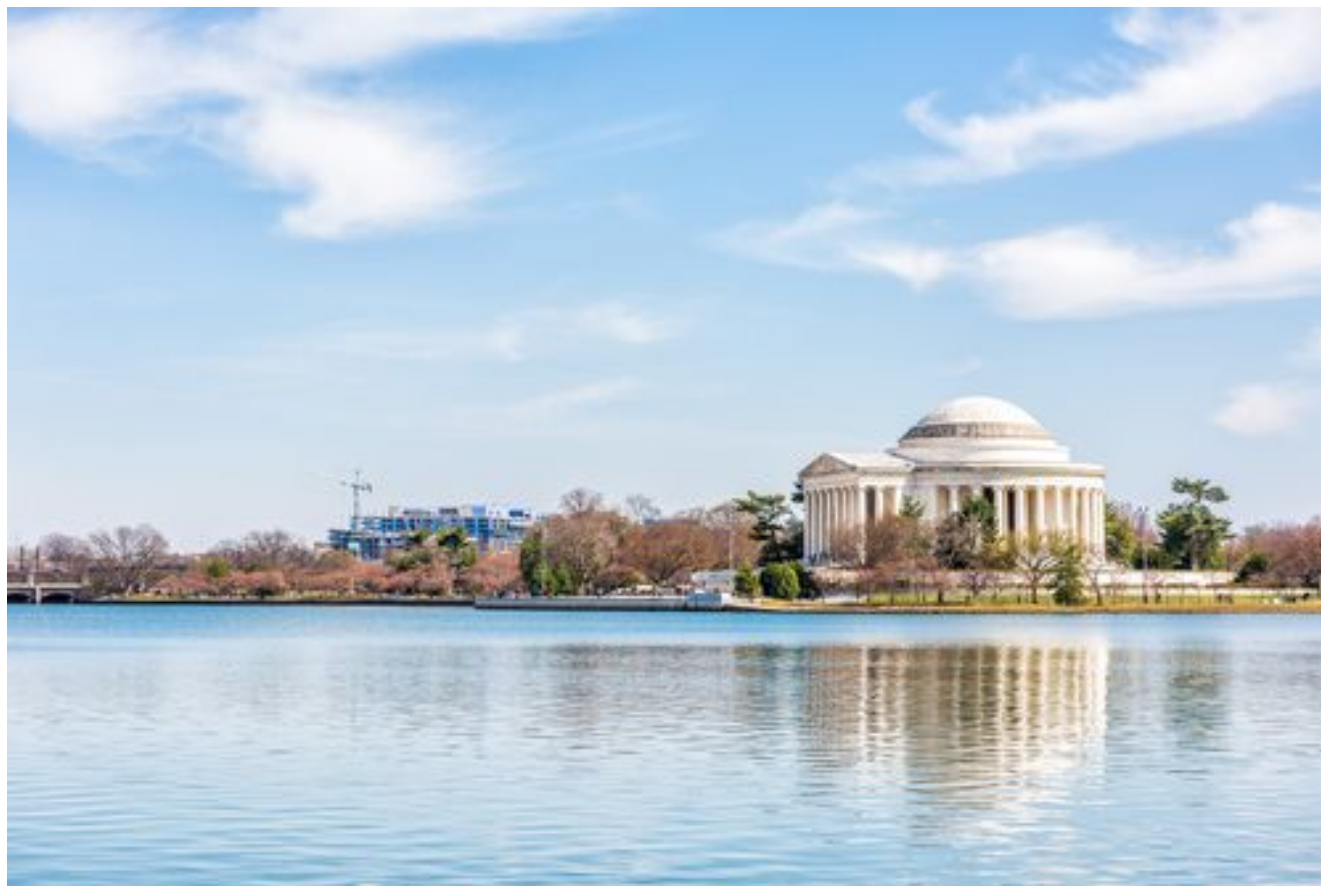


LUCAS, MORELAND and MASTBROOK, INC.

Weekly Update



Tax Update

The 2023 Tax Organizers were sent via Portal and, (upon request), hard copy. To save considerable time, trees, and postage the preferred document delivery method is via your Portal. *We corrected a "Portal" email signature block for LBA, CPA referencing the Closed Maryland Office. We are here in Tysons and look forward to helping you.*

File early to avoid delays and mitigate underpayment concerns. The **Internal Revenue Service (IRS)** raised the stakes for underpayment; the underpayment fee can be 8%.

Control your Portfolio, Estate, Trust, and Retirement with proper management. Retain us for annual reviews. Vince is a CPA, Former AICPA Instructor, RIA, and Licensed Life Agent. Terri is an EA with over 30 years of experience. Vince can mitigate investment losses with our Asset Recovery Plan.

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

Thank you for your referrals!

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

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.

"The art of investment is the discipline of inaction in the absence of a good opportunity, but aggressive action when one is identified."



LUCAS, MORELAND
and MASTBROOK, INC.

Lucas, Moreland, & Mastbrook, CPA
McLean, VA. | 703-893-9320



Share This Email



Share This Email



Share This Email

LMMTAX | 8201 Greensboro Drive, Suite 613, McLean, VA 22102

[Unsubscribe cathy@lmmtax.com](mailto:cathy@lmmtax.com)

[Update Profile](#) | [Constant Contact Data
Notice](#)

Sent byvince@lmmtax.compowered by



Try email marketing for free today!