

Wagner Planning

ENVISION • PLAN • ACHIEVE

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January 25, 2024

Dear Client,

Thank you for the privilege of serving you this year. We appreciate your trust and confidence in helping you reach your financial goals and improving your financial life.

This year's tax form 1099R for retirement distributions will be mailed by the end of January. If you have taxable investment accounts, your form 1099 will be mailed by mid-March to reduce the need for revisions. With online access your forms may be available sooner. We recommend logging in and reviewing your e-delivery preferences prior to delivery of tax documents.

Please contact your tax preparer at your earliest convenience and let us know if our office can assist in any way.

If you are eligible to make retirement plan contributions and would like to make a prior year contribution, please let us know in advance so we can prepare the required paperwork. Confirm with your tax preparer regarding your contribution deadline and limits, as these can vary.

As we mentioned in our [January 2023 Newsletter](#), the Secure Act 2.0 had several impactful updates, such as raising the age you are required to take withdrawals from your qualified accounts to 73 years old. Our office is prepared for these new requirements and will continue assisting you with your specific situation.

All the best for 2024!

Sincerely,

Sandra J. Wagner, CFP®
President & CEO

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