

Alternative Minimum Tax (AMT) Advice

Dear [Client's Name],

We hope this letter finds you well. As part of our ongoing commitment to providing you with enhanced tax planning strategies, we would like to discuss the implications of the Alternative Minimum Tax (AMT) on your financial situation.

The AMT is designed to ensure that individuals with higher incomes pay a minimum amount of tax, regardless of deductions and credits. As your income has increased over the past year, it is crucial to evaluate how AMT may impact your overall tax liability.

Key Considerations:

- Review potential AMT triggers such as high state and local tax deductions, exercise of incentive stock options, and certain types of income.
- Analyze your current tax situation and any deductions or credits that may be limited under AMT rules.
- Consider strategies to minimize AMT exposure, including timing of income and expenses, as well as investment choices.

We recommend scheduling a meeting to discuss your specific circumstances and how we can help optimize your tax planning strategy in light of the AMT. Please feel free to contact our office at [Contact Information] to arrange a convenient time.

Thank you for trusting us with your tax planning needs. We look forward to assisting you further.

Sincerely,

[Your Name]

[Your Title]

[Your Company]

[Phone Number]

[Email Address]