**Tax Packages for Your High Value Clients**

**A simple, but welcome value-add.**

Years ago, my own personal Financial Advisor sent me a very simple letter along with a plastic business size folder to store all of my incoming tax slips and information.  WOW - here I am five years later STILL using this durable, plastic envelope!  Yes, as the various tax slips and related information come to me throughout the year, I simply put them in this envelope and forget about them until now - Tax Time.  Exhale.

This simple item is a major stress-reducer for me because before I’d often forget where I put the various slips and information, which led me to having to request duplicates.  This is not only time-consuming but also frustrating for all involved.

If this idea is something you believe would add value to your clients - let’s get it done for the very next tax season!  Refer to the **sample letter** on page 2 which is all that is required along with the Tax Envelope. However, if you are able to include additional information related to **tax-slip deadlines** (which many firms have assembled and ready to go) we encourage you to do so.

**Tax Envelopes**

You may have access to some awesome, already-branded **plastic envelopes** at your firm, and if not here are some options from Staples that I found which may be of interest to you (simply copy & paste these into your browser[[1]](#footnote-1)):

* <https://www.staples.ca/en/jam-paper-plastic-envelopes-with-velcro-brand-closure-letter-booklet-9-3-4-x-13-assorted-colours-6-pack-218v0assrt/product_2477999_1-CA_1_20001>
* <https://www.staples.ca/en/JAM-Paper-Plastic-Envelopes-with-Zip-Closure-Letter-Booklet-9-5-x-12-5-Blue-Poly-12-Pack-218Z1bu/product_262848_1-CA_1_20001> (they have these individual colors)
* <https://www.staples.ca/en/Staples-Top-Loading-Poly-Envelopes/product_638070_1-CA_1_20001>
* <https://www.staples.ca/en/Staples-Poly-Zip-Envelope-Letter-Size-Assorted-Colours/product_600242_1-CA_1_20001>
* <https://www.staples.ca/en/Staples-Translucent-Expanding-Poly-Folder-Letter-Size/product_41487_1-CA_1_20001?akamai-feo=off>

You want to make sure you choose one that is at least 8.5 by 11” in size.  I also strongly encourage you add a quality label with the logo and the client’s name - remember Tax Package is NOT intended for all of your clients, just your VIPs.

**Extra Value-Add**

Some teams go above and beyond for their highest, high value clients and include **Gain/Loss Report** and other tax-related information they know will be requested by the client and/or their accountant - but don’t let this stop you - it is not required.

**Tax Package Cover Letter**

*Along with this Cover Letter include an over-sized plastic pouch, which includes a label affixed to it with the client’s name and your logo. Optional: You may also wish to include a schedule of tax-slip deadlines and/or Gain-Loss Reporting.*

February 24, 2019

Name

Address

Address

Dear [Client],

Yes, it’s official – it’s tax time again.

It’s Always About Simplification – For You

As you know, we are here to help you simplify, organize and coordinate *all* aspects of your Wealth Management – which most certainly includes Tax Planning. As such, we are sending along a reusable Tax Pocket which you can use throughout the year to store the various tax slips and related tax information you receive so it is readily accessible when you need it - at tax time.

Don’t let the simplicity of this fool you – most of us have at some point lost tax slips and information and had to go through the frustration of requesting and waiting for duplicates. Those days are over.

It’s Also About Timing

We’ve also included an outline of deadlines related to the various tax slips you may receive this time of year, which we hope you find helpful.

Here to Serve You

We hope this Tax Package makes your life a little easier during tax season.

As always, feel free to contact us if you have any questions and we will be more than happy to assist.

Sincerely,

Advisor’s Name

Advisor’s Title

1. Note: Individual products and availability will vary – you may wish to simply do a search at [www.staples.ca](http://www.staples.ca) for ‘plastic envelopes’ to get a view of the latest and greatest they have to offer. [↑](#footnote-ref-1)