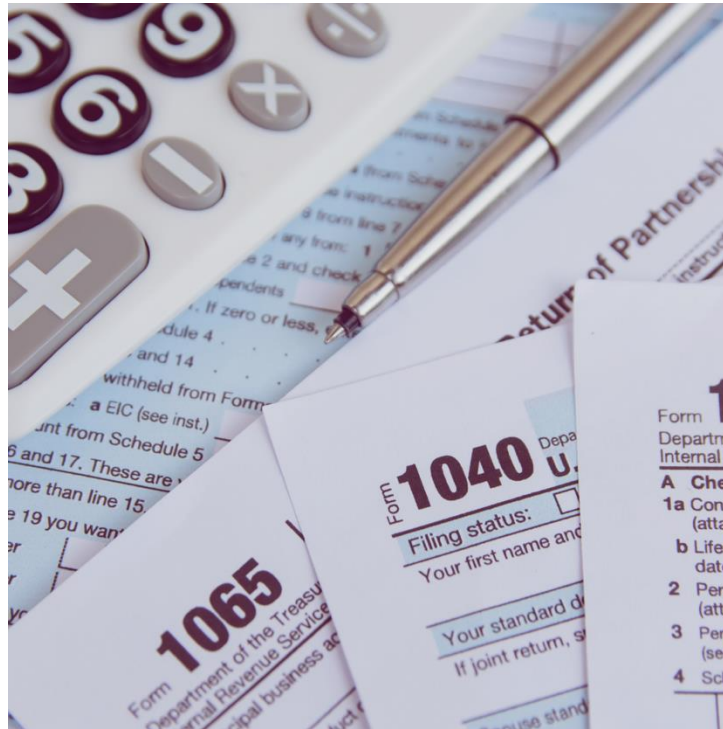


January 31, 2023

## Press Release

# TDECU Wealth Advisors ready to help for the tax season



The tax season has begun, and the documents are on their way!

Taxpayers will soon receive alerts, emails, and letters in their mailbox with all the information needed. You may have already received your W-2s which employers are required to send out by January 31. Tax Day is a few days later than usual —since April 15 falls on a weekend, and the following Monday is a holiday, the deadline for filing this year’s taxes is April 18, 2023. So even if you don’t get a refund, you’ll at least have a later deadline!

TDECU VP of Wealth Management Ed Cruz offers these tips to help get you started:

- **Gather your tax documents and information**
  - In addition to your W-2, be on the lookout for other important documents you’ll need for filing your taxes, such as 1099 forms reporting any investment income and 5498 forms noting contributions and rollovers to individual retirement accounts.
- **Document your credits and deductions**
  - Deductions can lower your taxes since they reduce your taxable income, so claim as many as you legally can. Gather documentation for any donations, expenses for medical care, mortgage interest, retirement account contributions, and local and state taxes you paid in 2022.

- **Review your estimated tax payments**

- Gather and provide information on how much you've already paid in taxes, whether through estimated tax payments, income withholdings, or both. This helps you quickly calculate your total amount due once you've entered your income, deduction, credit, and withholding information.

For more information about what you need to prepare your taxes you can click here. [insert link] Information provided by TDECU Wealth Advisors is not intended to be a substitute for specific individualized tax advice. We suggest that you discuss your specific tax issues with a qualified tax advisor.

- TDECU Wealth Advisors are also ready to help consumers with other financial needs such as: **Financial planning and money management**
- **Portfolio management**
- **Investments and savings – mutual funds, stocks, bonds, CDs, and more**
- **Retirement planning and tax-advantaged accounts**
- **College fund planning and savings plans**
- **Insurance planning**
- **And more!**

If you are interested in talking with TDECU VP of Wealth Management, Ed Cruz, please contact Mike O’Neill, TDECU’s Director of Public Relations, at 346-901-4982 or [moneill@tdecu.org](mailto:moneill@tdecu.org).

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