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Dear Client:

Please consider requesting that your tax preparer send your final tax return and supporting documents to Weller Group for our records once you have filed your 2023 income tax return.

Below is a permission slip that you can provide to your tax preparer outlining the documentation that Weller Group would like to obtain after your 2023 tax return has been filed.

Please either forward this to your tax preparer by email or bring the slip with you to your tax preparation appointment.

How do these documents help Weller Group?

1. Approximating taxes due on withdrawals from investment accounts
2. Recommendations on investment contribution amounts based on IRS limits
3. Calculating retirement projections
4. Determining when you should apply for Social Security
5. Projecting tax withholding on other income, such as pension, Social Security, etc.

Provide this bottom portion to your tax preparer



REQUEST: Please provide our mutual client's 2023 income tax return and supporting documents to Weller Group for our records.

SUPPORTING DOCUMENTS: These may include, but are not limited to, the following:

- W-2's
- Tax Form 1099
- Tax Form 5498
- Social Security 1099

METHOD: Please send these final documents to Weller Group in one of the following manners:

1. Email as an attachment to info@wellergroupllc.com
2. Send a secure message through your own portal to info@wellergroupllc.com
3. Send a secure message through Weller Group's client portal Investor360.com
(call our office at 315-524-8000 if you do not have Investor360 login credentials)

If you have any questions, please call Weller Group at 315-524-8000.

Client Name

Co-Client Name