



a national affiliate of SEIU

A United Voice for Doctors, Our Patients,
& the Communities We Serve

Benefit for Doctors Council members and your families

Tax Preparation Services and Financial Planning

-Doctors Council has partnered with Stacey Braun Associates, Inc. to provide Tax Preparation and Financial Planning at greatly reduced rates for our members and your families.

Stacey Braun Associates, Inc. is an investment advisory company that was established in 1977, and provides asset management and financial planning services, including tax planning and preparation services, to institutions and individuals.

- Tax Preparation Services:



- ✓ Includes preparation, review and filing of individual and joint Federal and State income tax returns
- ✓ Consultation on current and future tax planning and strategy concerns (such as deferred comp, home and education funding)
- ✓ Fees range from \$200-\$600 depending on complexity
- ✓ No additional fee to use the Financial Planning Program

- Financial Planning Program:



- ✓ Includes up to 6 hours per year for just \$150 (fee can be applied to tax preparation services)
- ✓ Financial consultation with you and your family
- ✓ Unlimited access to financial tools
- ✓ Free and unlimited access to Stacey Braun's E-Mail Helpdesk
- ✓ Written financial review upon request

Eligibility is open to all those who have returned a new membership form and who are current in dues.

To use this benefit, email info@doctorscouncil.org or call 212-532-7690

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