IRS Form 1040 Opportunities Producer eKit

Tools	
Form 1040 Overlay	Gathering the necessary information is easy when using IRS Tax Form 1040. This overlay form makes it easy to take that information and ask the appropriate questions needed to turn the information into a meaningful data that can uncover potential shortfalls in your client's financial plan. **Target Audience: All producers**
Form 1040 Worksheet	Take it one step further and utilize this worksheet to jump start the conversation with your clients. By coupling this worksheet with the 1040 overlay you are now capable of identifying opportunity and providing solutions to the shortfalls that may exist. **Target Audience: All producers**

Education	
Form 1040 Advisor Guide	This advisor guide was designed to walk you through IRS Form 1040 in detail. The guide highlights select sections and provides you with questions that will give additional details for your clients' planning needs. **Target Audience: All producers**

Engagement & Prospecting	
Centers of Influence Pre-Approach	Offer something different to your advisors. This **customizable** pre-approach letter is designed to help your advisors introduce themselves to CPAs and Tax Professionals and get the conversation started. Whether your advisor has existing relationships and is looking for a way to get the conversation started or they are looking for new relationships, this letter is a great resource. **Target Audience: Advisors looking to work with a CPA or Tax Professional**
Prospecting Letter #1	CPAs and Tax Professionals may have a difficult time introducing this new service to their clients. This **customizable** prospecting letter is designed for CPAs and Tax Professionals that have clients nearing retirement and notifying them of the financial planning services now available. **Target: Producers working CPA or tax professional for referrals**
Prospecting Letter #2	CPAs and Tax Professionals may have a difficult time introducing this new service to their clients. This **customizable** prospecting letter is designed for CPAs and Tax Professionals that have younger clients and notifying them of the financial planning services now available. **Target: Producers working CPA or tax professional for referrals**

This eKit was packaged and delivered to you with the design to guide you through the process of reviewing the IRS Form 1040 with your client, and finding additional solutions and planning opportunities. Please contact us for continued help and suggestions.

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