

# We Got This.

Mar. 2024

## Uncovering Hidden Gems: Lesser-Known Tax Deductions to Ease Your Tax Burden



As tax filing deadlines get ever closer, the annual ritual of sorting through receipts and forms to uncover potential deductions can add an extra layer of stress to an already overwhelming season. But fear not, for amidst the sea of paperwork lies a treasure trove of often-overlooked deductions that could significantly reduce your tax bill. While the tried-and-true deductions like mortgage interest and charitable contributions are familiar to many, delving deeper into the tax code reveals a wealth of lesser-known opportunities to save.

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## Member Notice

Updated Fee Schedule Effective 5/01/24

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**Invest with an  
advisor who shares  
your values.**

**- Brian J. Singer**

**Email Brian to discuss your  
Investments and Financial Goals.**

**[BrianSinger.cfsinvest@wefloridafinancial.com](mailto:BrianSinger.cfsinvest@wefloridafinancial.com)**



Brian Singer is our InTouch Credit Financial Advisor, Brian Singer available through CUSO Financial Services, L.P. (CFS).

Bringing a breadth of experience in financial planning, Brian has helped his clients reach for their goals with confidence. With over 15 years working in the financial industry, he brings expertise and experience to those seeking financial planning and wealth management. Working together, Brian helps his clients make sound financial decisions consistent with their comfort level, investment timeline, and goals.

Brian will discuss your investment solution, how it addresses your concerns, how the solution benefits your financial plan and any associated fees. By meeting with you periodically, Brian will work with you to keep your plan on track and on course for you to achieve your financial goals.

We are confident his services will be beneficial to you. Whether you are considering retiring or just getting started, Brian is here to help.

Contact Brian today to begin reviewing vital financial priorities such as:

**401(k), 403(b), 457, TSP Rollovers  
Retirement Planning  
Higher Education Planning**

**Tax Efficient Investments†  
Creating Retirement Income  
Life Insurance/Long Term Care**

**[EMAIL BRIAN](mailto:BrianSinger.cfsinvest@wefloridafinancial.com)**

Non-deposit investment products and services are offered through CUSO Financial Services, L.P. ("CFS"), a registered broker-dealer (Member FINRA/SIPC) and Registered Investment Advisor. Products offered through CFS: are not NCUA/NCUSIF or otherwise federally insured, are not guarantees or obligations of the credit union, and may involve investment risk including possible loss of principal. Investment Representatives are registered through CFS. The Credit Union has contracted with CFS to make non-deposit investment products and services available to credit union members. † For specific tax advice please consult a qualified tax professional.

# UPCOMING EVENTS

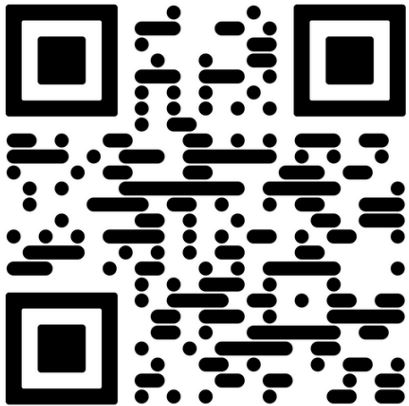


**April 19th, 2024 @ 7:30 PM – 10:30 PM**

**American Lung Association Las Olas Food & Wine Festival:**

[MORE EVENTS](#)

We will be tabling at the 28th annual Las Olas Wine and Food Festival on Las Olas Boulevard on Friday, April 19th from 7:30 PM – 10:30 PM. The charitable event will delight even the most discernible palate with the best culinary offerings in South Florida. The festival is hosted by the American Lung Association, with proceeds going to support the organization's lifesaving mission in Florida and beyond.



**May 8th @ 5:30PM**

**We Florida Financial Annual Meeting**

[REGISTER HERE](#)

**Register to join us via Zoom for our Annual Meeting.**

Members may join us to listen and participate in the meeting by registering above. Scan the QR code or use the following link:

**<https://qrco.de/beg2yD>**

Membership is required. Membership is open to individuals located in 46 Florida counties. Members must open and maintain a savings account with a minimum balance of \$5 for the duration of their membership.

*Federally insured by NCUA*

