

Tax Planning for 2011

I am sure most of you have already done your taxes for this year but for those of you that haven't, your CPA and tax preparer would like you to get busy! It is also important to look ahead as to what next year may bring in regards to taxes. If Congress does not get around to making any new changes this year, that does not mean we won't have changes. As the tax laws currently read, if no changes are made this year, the 2011 tax rates will revert back to those in effect in 2001. This means the highest bracket will increase from 35% to 39.6%. Additionally, the current 10% bracket would disappear. Long term capital gains tax rates will go back to 20% from the current 15% level, and dividends will be taxed at your highest marginal tax rate instead of the current 15%. The Masters Group will keep you updated as changes occur.

-Tim Hawkins

Welcome Heath Hanson

The Masters Group was excited to expand our team in mid-February with the addition of Heath Hanson, a Research Associate. He is responsible for conducting research, helping to maintain data integrity, and supporting overall client portfolio management. In addition, Heath works closely with our other team members responding to client inquiries and account servicing needs.

Heath is a 2009 graduate of Iowa State University. He has a Bachelor of Science in Finance.

Looking for K1 Partnership Tax Forms?

As always, most of the companies issuing K1's will attempt to have them mailed no later than March 31st. Some companies have already mailed them out. If you do not yet have yours, you may contact Heath or Kristen at our office to find out when your K1 is scheduled to be mailed, or if you should be expecting a K1 from any of your investments at The Masters Group. In some cases, we can

have a K1 forwarded to us electronically, and then we can forward it on to you. heath@mastersgroupinc.com or kristen@mastersgroupinc.com.

Annual Movie Night

We hope you are planning to join us for two great financial presentations at our Annual Movie Night on Tuesday, March 30th at Fleur Cinema & Cafe in Des Moines. Consider inviting a friend that may be concerned about what taxes will do to their retirement accounts. For more details and to RSVP, please contact Kristen at 888-219-9843.

Online Access

Did you know you have the ability to view your brokerage accounts online? You can view account balances, activity, statements, performance, and more!! You can also view your entire household's accounts under one USER ID. Just call or email Kristen, kristen@mastersgroupinc.com, and she will send you the instructions to set up your access online.