

From: Dave Mirolli [REDACTED]
Sent: Fri, 8 Sep 2017 14:51:42 -0400 (EDT)
To: D [REDACTED]
Cc: T [REDACTED] E [REDACTED]
Subject: Re: 2016/2017 tax items/issues

D [REDACTED]

Sorry I couldn't get to you this week. If [REDACTED] has a carry forward of \$122k into 2017 and expectation is for \$680k for AGI here is the math.
 $\$680k/2 = \$340k - \$122k = \$218k$ more allowed for deduction.

[REDACTED], you should be able to invest at the 3 unit minimum of \$55k and be fine.

[REDACTED] If you didn't get an Ecovest Rocky Creek K1 this year you can email E [REDACTED]
She can get you anything you're missing. If you CC [REDACTED] on the email she should be able to send to both of you.

[REDACTED] would file each 8886 form separately. When computing the tax savings of the 2016 charitable deduction I would only use the federal savings since this form is not required for State. Include only the savings utilized in that tax year so don't include the \$122 carry forward.

All make sense?

Be advised the Senate is voting today on the Bill that defunds the IRS for all conservation easement listed transactions prior to January of 2017. Doesn't take away the filing requirements but does remove the teeth.

Dave

| David S Mirolli | Managing Partner

Atlanta Magazine Five Star Wealth Manager Award Winner
[REDACTED]

P: [REDACTED]

| [REDACTED]

| [REDACTED]



[REDACTED]

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From: D [REDACTED]
Date: Friday, September 1, 2017 at 3:15 PM
To: D Mirolli [REDACTED] T [REDACTED]
Subject: 2016/2017 tax items/issues

D [REDACTED] / T [REDACTED]

A few questions and items for the 2016/2017 tax returns and planning:

1. Is there a 2016 K-1 from Rocky Creek? Probably not a lot of info, but I'll need to report it if there is one.
2. Contribution carryforward from Belle Harbor to 2017 is \$122,920 (may change upon review, but should be close to this number)
3. [REDACTED] you do not need any more withholding for the year – you'll still have a large overpayment, but you should discuss with your HR department how to avoid withholding on your bonus coming up – normally, companies will do a Statutory 25% Fed w/h from the bonus (IRS allows flat rate from bonuses/options), but you may be able to avoid it. As far as your regular checks go, if you went up to a large number of exemptions (8 or so – not sure how many you can max out on), or if your HR people have a way to tell you what will get you to zero, I'd go with that for the rest of your regular paychecks. This is for Fed only – you will need the Ohio withholding.
4. On the Form 8886 – can we mail these altogether, or should we mail them separate by year – for mailings to Utah
5. Is there any statement or info (besides the form 8886) that we should attach to [REDACTED]'s return?
6. Dave – can we set up a teleconference next week, so you can walk us thru you policies and procedures on these investments, as well as defense strategies and other items – I'll be out Tuesday, but am open most of the rest of the week.

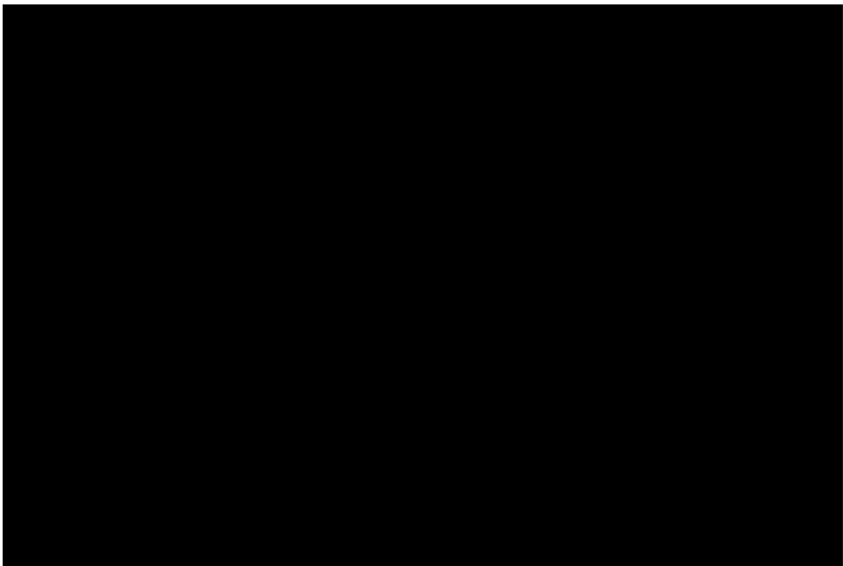
I think that's everything – if I missed anything, you have questions on anything, or there's some info I requested, please get back to me when you can.

Thanks

We appreciate referrals and are taking on select new clients. Thank you.

[REDACTED]

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