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UPCOMING WEBINAR

Year-End Tax Planning Strategies

Wed, Dec 2 at 12 PM PT | 3 PM ET

OpenPlan is the advisor on your 401(k). This educational webinar is part of that service and is intended to help you prepare for 2027. We'll explore key strategies and considerations that may help you make informed decisions before filing your 2026 return.

What We'll Cover

- Important year-end tax deadlines and planning opportunities
- Changes on the horizon that may affect your 2027 tax planning
- Strategies to help maximize retirement and tax-advantaged savings

To register, scan the QR code or visit:
https://pages.openplan.us/year-end-tax-planning-strategies-registration.html

Questions? We're here to help. Reach us at **advisorsupport@openplan.us**.