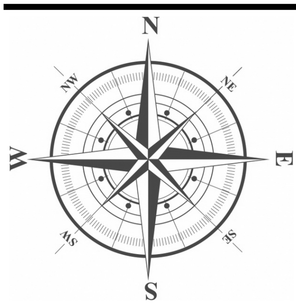
Financial Resilience and Education Center

College of Family and Consumer Sciences

UNIVERSITY OF GEORGIA

Partnering with You in Charting Your Financial Journey



TAX-EFFICIENT FINANCIAL PLANNING EDUCATION

FREE SERVICES

CONFIDENTIAL

Taxes are a major part of financial planning.
We are here to help you with past, present, and future tax needs, education, and planning, and making your financial plan and future as resilient as possible.

One-on-One Session

- We offer private CONFIDENTIAL one-hour sessions (in-person or virtually) with a trained financial educator
- Our Goals is to equip you with the tools you need to reach Financial Resiliency

Who Does This Fit?

- UGA Faculty, Staff, and Students
- Community Members in Athens, Bogart, Watkinsville, and beyond

Low Income Taxpayer Clinics
REPRESENTATION • EDUCATION • ADVOCACY

Volunteer Income Tax Assistance
UNIVERSITY OF GEORGIA

Tax-Efficient Analysis for:

Tax Withholding
Tax Credits
Estate and Gift Tax
Tax and Income Savings
Roth conversions

Tax-Efficiency Strategies for:

Retirement
Investing
Education
Social Security

Tax Education for:

Roth vs Traditional
Retirement Acct Rollovers
Tools to minimize Taxes
Required Minimum Distributions (RMD)
Qualified Charitable Deductions

Navigating Taxes through Life Changes such as:

Retirement
Births or Empty Nesting
Marriage or Divorce
Selling a House
Death and Probate

For information, please contact Deborah Lacey, CPA, CFP®, MST at Email: Deborah.SnowLacey@UGA.edu

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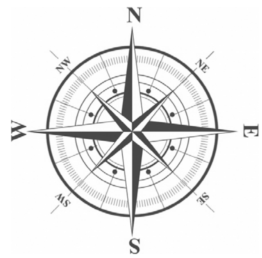

FREC ~ Tax-Efficient Financial Planning Education

Seminars

We offer group seminars (in-person or virtually) by trained financial educators which can be customized to your group members needs on a wide range of financial topics

Don't Fret, Call FREC !

The UGA Financial and Tax Planning program provides access to competent, unbiased, and client centered traditional financial and tax planning education to create financial resiliency.

Who is the Team?

- Trained UGA Financial Planning Students
- UGA Professors with Industry Experience
- Students in Service-Learning Course FHCE 4235S

Items to Gather Prior to Visit:

- Current Income Records such as paystub, W-2, 1099
- Copy of last 2 tax returns (Form 1040) filed
- Investment and Banking Statements
- Other statements pertaining to particular topic

What You Can Expect

- Confidential & Nonjudgmental Collaboration
- Knowledge for your Financial Future
- Equipping in Economic Stability

Working Along-Side UGA's Volunteer Income tax Program (VITA) and UGA's Low Income Taxpayer Clinic (LITC) providing Financial

Volunteer Income Tax Assistance
UNIVERSITY OF GEORGIA

LITC Low Income Taxpayer Clinics
REPRESENTATION • EDUCATION • ADVOCACY

Also available for Faculty, Staff, Student needs as well as community members who may not be in the VITA or LITC program.

The UGA LITC has a Reasonable Accommodation/Reasonable Modification Policy for people with disability. Please let us know if you require any accommodation to access our services by calling (706) 254-9218 or emailing LITC@UGA.edu.