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It's that time of year for part-time help at the local tax-preparation location, when drivers can see seasonal staff standing at busy intersections wearing costumes of the Statue of Liberty or Uncle Sam. But they're not the only ones who are hired part time, says Gary Marriage, Jr., a professional advisor to CPAs

"I sometimes ask people, 'Do you want a guy in a costume to handle your taxes?' Of course, the guy actually doing the paperwork probably won't be the guy standing near the traffic, but he's also not the person you want dealing with your bottom line," says Marriage, CEO of Nature Coast Financial Advisors ([www.naturecoastfinancial.com](http://www.naturecoastfinancial.com)).

"I know millionaires who go to these pop-up tax firms; they'd rather spend a few hundred dollars on their return than a grand or two with a skilled CPA [or Enrolled Agent]. But this apparent savings comes at a cost, because a good accountant is likely to find many thousands of dollars in savings in a single tax return, and they are far less liable to make a mistake."

Marriage offers additional tips for consideration this tax season.

- **Have your records handy, and consider a long-term relationship.** Not only is it advantageous to file taxes through a CPA, it's also smart to have all relevant records readily available at your disposal – no matter who is helping you with your return.

"Not only do I strongly advise you to use a reputable CPA that you can trust, I also think you should try to establish a long-term relationship with him or her,"

Marriage says. “Think of a financial professional as similar to a doctor or lawyer –

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of total federal taxes, excluding the burden on corporate and investment taxes.

“There are many high-income earners who are passionate about their careers and love what they do; they care more about their work than their income,” he says.

“These tend to be the folks who need reminders that there are legal avenues available for protecting their hard-earned money.”

- **High-net-worth individuals should consider CRAT.** Many people, financial professionals with years of experience, do not know about Charitable Remainder Annuity Trusts, a form of financial protection that Marriage often teaches to CPAs. CRATs are a flexible and effective instrument used in financial and estate planning. A CRAT provides a significant tax shelter for any assets and property placed within it. That allows any assets in a charitable remainder annuity trust to increase in value without being taxed on the increase. A well-constructed CRAT can provide financial security for the annuitants.

“CRATs are surprisingly underutilized, but many CPAs I run into simply don't know about it,” Marriage says. “It's worth asking your financial advisor about, and if your advisor is unfamiliar with the structure, encourage him or her to look into it.”

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