

WE'RE LOOKING FOR ONE NEW

ACCOUNTING CLIENT

HOWDY, WE'RE

MINT ADVERTISING.

WE'VE BEEN AROUND THE BLOCK A FEW
TIMES, AND A FEW MORE TIMES, AND A FEW
MORE TIMES AFTER THAT IN OUR

**MORE THAN 22 YEARS
IN BUSINESS.**

WHAT WE OFFER:

**FRESH THINKING
FOR DRIVEN BRANDS.**

AND MORE RELEVANT TO YOU IN THE

~~food, tech, manufacturing~~

ACCOUNTING INDUSTRY

CHECK OUT THIS

PROJECT HIGHLIGHT FOR A MULTI-OFFICE MEDIUM-SIZE ACCOUNTING FIRM.

Schulman Lobel
certified public accountants and advisors

"...THE WISDOM TO KNOW THE DIFFERENCE."

The difference between a wise and a foolish "business leader" often depends on the manner in which he or she speaks. A wise leader knows the difference between a wise and a foolish statement and chooses to speak wisely. A foolish leader does not.

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A wise person does not act or speak rashly. They carefully consider a situation and their options, and then respond. A wise person can be trusted.

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THE TONE OF VOICE

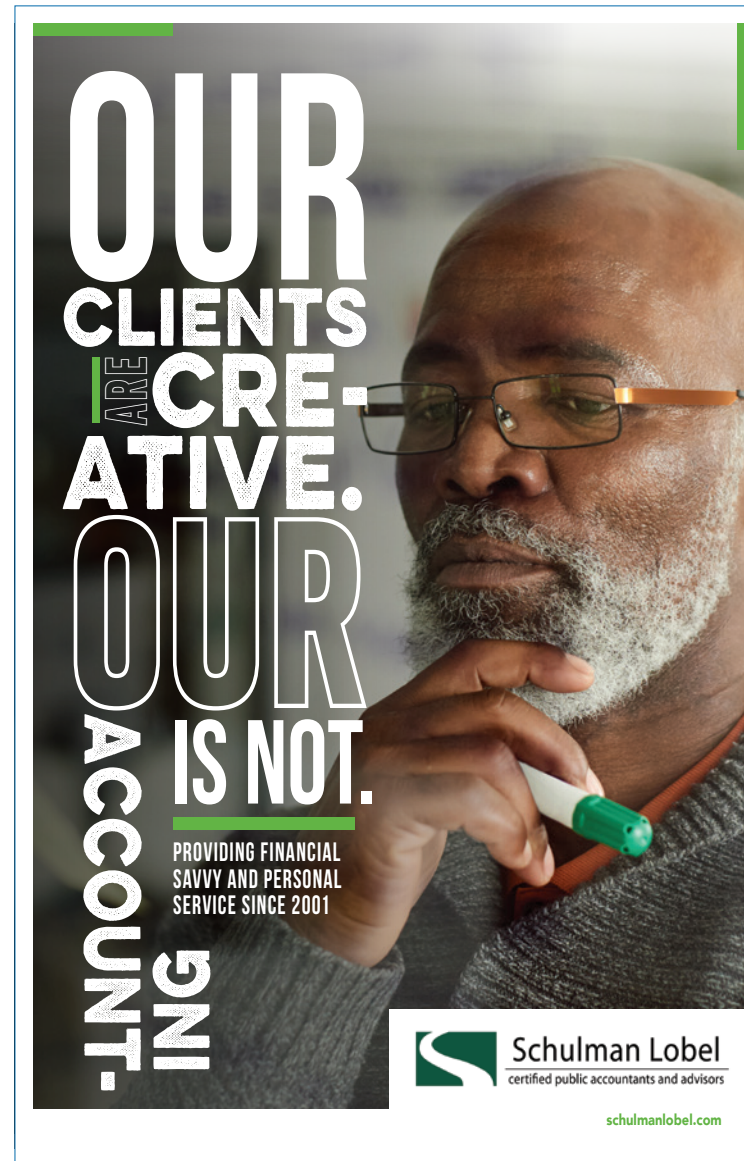
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**OUR
CLIENTS
ARE CRE-
ATIVE.
OUR
ACCOUNT-
ING IS NOT.**

PROVIDING FINANCIAL
SAVVY AND PERSONAL
SERVICE SINCE 2001

 **Schulman Lobel**
certified public accountants and advisors

schulmanlobel.com

BOR- ING-ACCOUNTING FOR CREATIVE CLIENTS.

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SAVVY AND PERSONAL
SERVICE SINCE 2001

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MONTHLY SOCIAL MEDIA SUPPORT





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SCHULMAN LOBEL
BRAZILIAN ACCOUNTING
PRESENTATION

SCHULMANLOBEL.COM

INTRODUCTION TO WESLEY CHILDS

PARTNER — SCHULMAN LOBEL





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WESLEY CHILDS

AREAS OF SPECIALIZATION

- International Tax
- Tax
- Business Management & Family Office
- Entertainment/Athletes
- Family Businesses
- Real Estate and Construction






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INTRODUCTION TO SCHULMAN LOBEL

Certified Public Accountants and Advisors



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MEMBER OF IAPA

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INTRODUCTION TO SCHULMAN LOBEL

Certified Public Accountants and Advisors



SCHULMANLOBEL.COM

We are a “boutique” firm
that combines service and expertise of a large
company with individual, personalized attention
from senior staff.



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CURRENT TRENDS IN ACCOUNTING

- Technology, Automation, and AI
- Remote Work/Collaboration
- Cryptocurrency
- Data Security
- Green Tax Incentives
- CPA Shortage
 - 340,000 less than five years ago



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THANK YOU



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MONTHLY EMAIL NEWSLETTER MANAGEMENT



IMPORTANT DEADLINE REMINDERS, PLUS INFORMATION ON PUTTING A CHILD ON YOUR PAYROLL.

This email is part of our ongoing series for clients and contacts about key tax- and reporting-related deadlines throughout the year.

When the traditional date for a tax deadline falls on a weekend, the deadline is moved to the first non-weekend (and non-holiday) day. Which is why, this year, the key March tax dates that normally fall on the 15th have been moved to Monday, March 17, 2025.

- 3/17 — Partnership and S-corp Returns or Extensions Due
- 3/17 — Q1 C-Corp Estimated Payment Due
- 3/17 — NYS/NYC PTE (Pass-Through Entity) Elections Due
- 3/17 — NYS/NYC C-Corp MFI (Mandatory First Installment) Payment Due
- 3/17 — Form 3520-A Annual Information Return of Foreign Trust with a U.S. Owner Due

If you have any questions about whether any of the above applies to you or your company, feel free to reach out to your Schulman Lobel contact.

As usual, we'll follow up directly with individual clients as needed.

— The Schulman Lobel Team



SOME DEADLINES TO KEEP IN MIND, PLUS A SMART STRATEGY FOR CHARITABLE DONATIONS ONCE YOU TURN 70 1/2.

This email is part of our ongoing series for clients and contacts about key tax- and reporting-related deadlines throughout the year.

It's only the first month of the new year, but there are already some tax payment and documentation deadlines to remember — especially if you are self-employed or employ others:

- Wednesday 1/15 — 2024 Fourth Quarter Personal & Trust Estimated Payments Due
- Friday 1/31 — Due Date for Employers to Send W-2 Forms
- Friday 1/31 — Most 1099s Due

Additionally, the IRS starts accepting and processing 2024 tax returns in January, so now's the perfect time to start collecting and organizing receipts and statements to avoid a crunch later.

If you need clarification on whether any of the above applies to you or your company/organization, please ask your Schulman Lobel contact. We'll also engage with individual clients directly as needed.

— The Schulman Lobel Team



DID YOU KNOW? DONATING YOUR RMD FROM IRAS COULD BE A SMART MONEY MOVE.

If you are 73 years old or older, you must take a Required Minimum Distribution (RMD) from your IRAs and other applicable retirement accounts.

If you don't need these funds and want to lower your taxable income (which RMDs count toward), you can donate the money (up to \$108,000 as of 2025) to a charity — and you can start when you are 70.5 years old.

The money you donate in this manner is considered a Qualified Charitable Distribution (QCD). The primary advantage of a QCD over a cash donation is that a QCD directly reduces your taxable income.



SOME OCTOBER DEADLINES, PLUS AN OVERVIEW OF CHARITABLE REMAINDER TRUSTS (CRTs) AND MORE.

This email is part of our ongoing series for clients and contacts about key tax- and reporting-related deadlines throughout the year.

October marks the beginning of the fourth and final quarter of the traditional fiscal year. This month, there are only a few tax deadlines to remember.

Here are the major due dates in October:

- Tuesday, 10/15 — Extended Personal & Gift Return Due
- Tuesday, 10/15 — Last Day for Simplified Employee Pension (SEP) IRA Contributions

If you need clarification on whether either of the above applies to you or your company/organization, please reach out to your Schulman Lobel contact. We'll also engage with individual clients directly as needed.

— The Schulman Lobel Team

P.S. Please take a minute to read the rest of this email, which contains an overview of Charitable Remainder Trusts (CRTs) plus a spotlight on our services.



DID YOU KNOW? A CHARITABLE REMAINDER TRUST (CRT) CAN HELP YOU TAKE AN ADDITIONAL CHARITABLE TAX DEDUCTION AND CREATE AN ONGOING INCOME STREAM.



NOW THAT THE MAJOR APRIL FILING DEADLINES ARE BEHIND US, IT'S TIME TO FOCUS ON WHAT'S NEXT.

This email is part of our ongoing series for clients and contacts about key tax- and reporting-related deadlines throughout the year.

After all the important tax deadlines of April, there is just one for May:

- Wednesday, 5/15 — Not-for-Profit Returns or Extensions Due

If you have any questions about whether the above applies to you or your company/organization, please reach out to your Schulman Lobel contact.

As usual, we'll follow up directly with individual clients as needed.

— The Schulman Lobel Team

P.S. Take a minute to read the rest of this email — which contains an overview of our services.



DID YOU KNOW? GIFT TAX RETURN FAQ

WHO SAYS ACCOUNTING CAN'T BE COOL?

DEFINITELY NOT US.

PLUS WE UNDERSTAND THAT IT'S

ALWAYS TAX SEASON.

WE HOPE YOU LIKED WHAT YOU SAW AND

**CAN THINK OF A PROJECT OR
TWO YOU'D LIKE TO DISCUSS.**

IN THE MEANTIME, HERE IS MY

CONTACT INFO

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eric@mintadv.com | 917.880.9821

mintadvertising.com

THANK YOU.

mintadvertising.com

MiNT. FRESH THINKING