



NAGEL CPAs, LLC

Accountants & Advisors



To our clients, colleagues and friends

As another holiday season fast approaches, everyone at Nagel CPAs would like to wish you happy holidays and also express our gratitude for the trust you place in us as your accountants. We truly appreciate the opportunity to serve the people in our communities and across the country. We are definitely excited for the future and hope you are too.

You may have noticed on our website that Nagel CPAs has now branched out to Utah. One of our CPAs, Ryan Cooper, moved to the Salt Lake City area in 2018 and stayed on with the firm as a full-time remote employee. In 2019 we officially registered Nagel CPAs in Utah and established a local office. Ryan will be continuing to help our current clients while also growing our firm in Utah.

We also want to take this opportunity to congratulate Clark Gentry, CPA on his upcoming retirement at the end of December. Clark has been with Nagel CPAs since 2009 and in addition to being an important part of our team we have all appreciated and enjoyed having him here with us. We have been preparing for this transition for a while, with our other CPAs and staff ready to fill his shoes. We wish you the best Clark and are sure we'll see you around, most likely on your motorcycle.

Finally, be on the lookout for our annual tax organizers which we'll be sending out in December.

Below are two articles that we highly recommend.

Sincerely,

Bill Ortiz, CPA

Do you have a plan for your Estate? No matter the size of your estate, there are some important basics to consider.

[4 Ways to improve your estate plan](#)

If you are retiring soon, plan ahead for Roth conversions and save big on taxes.

[4 strategies for Roth conversions](#)

Nagel CPAs, LLC.

505-898-2558 www.nagelcpa.us



[Visit our website](#)