HEWINS
FINANCIAL
ADVISORS

Hewins Year-End Tax Reporting

Dear Client:

Tax time is quickly approaching! To make planning easier for you, we wanted to provide some details regarding the timing of reports from both Charles Schwab and Hewins Financial Advisors. Please be advised that Charles Schwab will delay mailing 1099s until mid-February in an effort to minimize the number of corrected 1099s. As soon as the 1099s are available, Hewins will review Schwab's 1099 reports against our accounting data.

As part of our services to you, we will prepare a supplemental report for accounts on which we advise and send it to you and to your CPA by March 4. This report contains information on securities that were sold throughout the year, as well as information on expenses. Please note that we will not include 1099 reports due to security concerns. Please be sure to provide your CPA with copies of your 1099s.

Please also note that as we are notified of revised (corrected) 1099s from Schwab, we will revise our reports as necessary. With Schwab's extended delivery date we are hopeful that we will not see as many corrected 1099s as we have in the past. However, it is likely a couple will surface. We will do our best to keep you informed as they come in.

As always, feel free to contact us with any questions.

Sincerely,

Martha R. Post

Martha R. Post
Principal, Chief Operating Officer & Chief Investment Officer