Wealth Enhancement
Tax & Consulting Services™

TAX YEAR 2026
WETCS Expanded Services FAQ

A client-friendly guide to enhanced tax preparation, planning, and advisor collaboration experience.

General Questions

What is changing with WETCS Services?
Beginning with the 2026 tax year, WETCS is expanding beyond traditional tax return preparation to provide a more comprehensive tax services experience with a greater focus on proactive tax planning intended to help clients realize more tax savings. Our enhanced service combines tax return preparation, proactive tax planning, personalized tax analysis, and collaboration between your assigned WETCS Tax Advisor and your Wealth Enhancement Financial Advisor to help identify opportunities throughout the year.

Why is WETCS making this change?
Many tax-saving opportunities occur before important financial decisions are made. Historically, tax professionals often identify opportunities after a return has already been filed. Our enhanced service is designed to help clients evaluate decisions proactively and integrate tax considerations into broader financial planning.

Will WETCS still prepare my tax return?
Yes. Tax return preparation remains a core component of our services. The enhanced service package adds tax planning, analysis, and year-round tax advisory support.

Can I continue with my current WETCS tax preparation service?
Yes. The existing tax preparation service remains an option for clients who were served by WETCS or a WEG Tax Partner program for tax year 2025.

Tax preparation and consulting services offered through Wealth Enhancement Tax & Consulting Services, LLC, a wholly owned subsidiary of Wealth Enhancement Group®.

Who is this enhanced service designed for?
The enhanced WETCS experience may be a good fit for individuals and families who:

- Value proactive tax planning
- Want their tax and financial professionals working together
- Have multiple income sources or investment accounts
- Own businesses, trusts, partnerships, or rental properties
- Anticipate retirement or other major financial decisions
- Prefer an ongoing advisory relationship rather than a transactional tax preparation experience

What's Included?

What services are included in the WETCS Individual Tax Service Package?
The bundled service includes:

- Comprehensive Prior-Year Tax Assessment
- Personalized Tax Planning Analysis
- Tax Return Preparation and Filing
- Advisor Collaboration
- Year-Round Q&A Assistance
- Up to two hours of customized tax planning support annually

What is the Comprehensive Prior-Year Tax Assessment?
This is a review of your prior-year tax results designed to identify trends, planning opportunities, and areas where tax savings may be available in future years.

What is the Personalized Tax Planning Analysis?
The Personalized Tax Planning Analysis is a forward-looking analysis intended to help you understand how future financial decisions may impact your taxes and to identify opportunities for tax efficiency.

Advisory services offered through Wealth Enhancement Advisory Services, LLC, a registered investment advisor and affiliate of Wealth Enhancement Group®.

What types of tax planning topics can WETCS help with?
Planning conversations or projects may include:

- Roth conversions
- Retirement income strategies
- Charitable giving
- Trust and estate planning coordination
- Required Minimum Distributions (RMDs)
- Tax-efficient investment strategies
- Net Unrealized Appreciation (NUA) planning
- Business owner tax planning
- Multi-state tax considerations

What does "Advisor Collaboration" mean?
Your Tax Advisor and Financial Advisor will work together to help ensure tax considerations are incorporated into your broader financial decisions. This coordinated approach is intended to improve decision-making and create a more integrated client experience. While the existing WETCS tax preparation service includes coordination between the Tax Advisor and Financial Advisor, the expanded tax planning included in the new bundled service enables greater opportunities for collaboration between your Wealth Enhancement tax and financial advisors to better serve your tax and financial needs.

Pricing & Service Options

What service options are available?
Clients who used WETCS in tax year 2025 have two service options:

1. Tax Preparation Only

- Tax return preparation and filing
- Advisor collaboration

2. Bundled Tax Preparation & Tax Planning

- Tax return preparation and filing
- Advisor collaboration
- Tax situation assessment
- Tax planning analysis
- Tax planning support
- Year-round access to an assigned Tax Advisor

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Can I select only certain pieces of the bundled package?
The bundled package is offered as an integrated service. Clients may choose either the complete bundled service or a different service option, but individual components within the bundle cannot be purchased separately.

How is pricing determined?
Pricing is based on tax return complexity and the services selected.

Planning & Support

When can I use my included tax planning time?
The included tax planning support is generally available between May 1 and January 15 and can be used for tax planning services offered by WETCS, including planning discussions for tax-sensitive decisions, and tax planning projects such as projections, and conversions.

What if I need more than two hours of planning support?
Additional planning services can be provided under a separate engagement billed at the standard WETCS rate of $300 per hour.

Can I contact my Tax Advisor during the year?
Yes. Clients enrolled in the bundled service have year-round access to their Tax Advisor for routine tax planning-related questions within the scope of the engagement.

Scope & Limitations

What services are not included in the Bundled Service Package?
Unless specifically agreed in writing, the engagement generally does not include:

- Audit representation
- Amended returns
- Business entity returns
- Gift tax returns
- Trust and estate returns not separately engaged
- International consulting projects
- Written tax opinions
- Tax authority disputes
- Bookkeeping or payroll services
- Extensive research, modeling, or specialized analyses

These items may require a separate engagement.

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What if my needs become more complex during the year?
If a project requires significant analysis, transaction modeling, written deliverables, or specialized research, WETCS may recommend a separately scoped engagement so that the necessary time and expertise can be dedicated to the project.

Next Steps

What do I need to do to continue with WETCS for 2026?
You will receive an email from <replace with email address> with the WETCS engagement letter and IRS Form 7216 Consent form for your review and electronic signatures. To continue receiving WETCS services, please select the desired service option and sign where indicated.

Who should I contact if I have additional questions?
Please reply to the email you received regarding your 2026 tax year service options and pricing, or email WETCSTaxSupport@wealthenhancement.com. Your WETCS Tax Advisor will also be able to assist.

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