

Annual Year-End Tax Update

THURSDAY, NOVEMBER 13TH, 2025 | 11:00AM - 11:45AM ET

Please join us for our 2025 Annual Year-End Tax Update call, led by our Director of Tax & Financial Planning, Marc Verdi. This client-only call will provide an overview of potential new legislation and how it may affect your taxes in 2025 and beyond. In addition, we'll go over year-end tax planning strategies that may help lower your overall 2025 tax burden.

Questions may be asked through the Zoom chat feature during the meeting or may be sent in advance to questions@godseyandgibb.com. If your questions are unable to be answered throughout the call, we will ask your advisor to follow up.

HOW TO JOIN THE CALL?

Visit www.godseyandgibb.com/tax-call-nov-2025/ for details on how to join the call either virtually (on your computer) or over the phone.

HOW DO I SUBMIT QUESTIONS?

Please email questions@godseyandgibb.com to submit questions for the Annual Year-End Tax Update.



SPEAKER: MARC A. VERDI, CPA/PFS, CFP®

DIRECTOR OF TAX & FINANCIAL PLANNING | CHIEF FINANCIAL OFFICER

Marc has over twenty years of experience in individual, trust, and gift taxation, and has overseen Godsey & Gibb's Tax & Financial Planning services since 2013. As our Director of Tax & Financial Planning, Marc is hands-on and proactive in working with our clients to evaluate and implement tax-efficient strategies, assist with their annual tax return preparation, and achieve their financial goals.

FOR THOSE UNABLE TO ATTEND:

A video replay, audio replay, and transcript will be sent out and available on our website within a week of the call at: www.godseyandgibb.com/tax-call-nov-2025/

THIS EVENT IS INTENDED FOR THE EXCLUSIVE ATTENDANCE OF GODSEY & GIBB CLIENTS.

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HOW TO JOIN OVER THE PHONE:

1. Dial this number: (301) 715-8592
2. Meeting ID: 859 8868 2006 followed by #
3. Participant ID: you do not need one, just press #
4. Meeting password: 111325 (the date) followed by #
5. You will be joined into the meeting as soon as it begins (at 11am)

HOW TO JOIN VIRTUALLY (THROUGH ZOOM)*:

1. Go to <https://zoom.us/join>
2. Meeting ID: 859 8868 2006
3. You may have a pop-up and need to click “open zoom meetings”
4. A box will pop-up for the password, enter the meeting date as: 111325
5. A box will pop-up asking for your name and email, enter them. These will not be shared with other attendees, only Godsey & Gibb team members.
6. If joining early, you’ll see a box saying “Please wait for the host to start the meeting” – the meeting will begin at the designated start time.

*Please note, if joining via zoom, the link provided through our event page (www.godseyandgibb.com/tax-call-nov-2025/) will allow you to skip entering the meeting ID and password.

QUESTIONS?

Email us at: questions@godseyandgibb.com

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DISCLOSURE:

This presentation is intended for the use of Godsey & Gibb Wealth Management clients and is not suitable for general retail public use. The information presented is for educational purposes and should not be substituted for personalized tax, financial, or legal advice, or used to guide investment and/or other financially-related decisions as individual situations vary. Any examples referenced, including the use of charts, graphs, formulas, and other illustrations, are not intended to be used independently to guide financial decisions. Information was obtained from sources considered reliable, but no representations or warranties are made to its accuracy, timeliness, suitability, or completeness. Forward-looking statements expressed are subject to revision due to changes to tax legislation as well as changes in market and economic conditions and there are no guarantees that these results will be achieved. **Past performance is not indicative of future results.**

For additional information, see our full disclosure here: www.godseyandgibb.com/disclosure/.