

Wipfli 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 Wipfli Hewins Investment 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, Wipfli 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

Principal, Chief Operating Officer & Chief Investment Officer

Important Disclosure Information

Wipfli Hewins Investment Advisors, LLC ("Wipfli Hewins") is an SEC-registered Investment Advisor and a proud affiliate of Wipfli LLP.

The reader should not assume that this general informational material provided by Wipfli Hewins, serves as the receipt of, or as a substitute for, personalized investment, tax, accounting, and/or legal advice.

A copy of Wipfli Hewins' current written disclosure statement discussing advisory services and fees continues to remain available for your review upon request. Please contact us if there are any changes in your personal/financial situation or investment objectives.