FOR IMMEDIATE RELEASE
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LOCAL COMPANY EXPANDS ITS COMMUNITY FOCUS BY ADDING INCOME TAX PREPARATION AND PLANNING SERVICE

SAN JOSE, CA JANUARY, 13 2014 – Estimates have shown between 75% and 80% of all taxpayers will pay more tax in 2013 than they did in 2012*.

Calrima Financial & Insurance Agency (CALRIMA) welcomes Juan Montes of San Jose, California to bring tax preparation and planning service to new and existing clients of CALRIMA.

ABOUT JUAN MONTES -- Juan is a graduate of San Jose State University, where he earned his B.S. in Business. Juan furthered his education by attending law school and is currently one semester away from earning his J.D. from Lincoln Law School of San Jose. While still a student at San Jose State, Juan started his own tax preparation business whose primary goal was to put the client first. After 8 years in business, Juan is joining Calrima Financial & Insurance Agency. Juan's role is to help people optimize their taxes. Juan is fluent in English and Spanish.

HELPING RELIEVE BURDENS & IMPROVE CASH FLOW

Now that the holidays are behind us, tax season has come again. To help members of the community increase their cash flow, CALRIMA is offering a complete tax return preparation service for $139**. Most peoples' biggest fear is running out of money. Our intention is to help people pay their fair share of taxes, and not a penny more. Doing so increases cash flow and therefore extending how long people's money lasts. As you likely know, a penny saved is a penny earned!

INTRICACIES OF IRA PLANNING

Mr. Loek is educated on the intricacies of an IRA planning, which makes up more than a quarter of the U.S. retirement marketplace. "IRAs total roughly $5.7 trillion in total retirement assets across the country," Ed Slott said from his company's semi-annual advisor training program. "They make up one of, if not the fastest growing component of the retirement market during the past 20+ years. They have increased 10 percent per year on average since 1990."

ABOUT RICHARD "RICK" LOEK – Rick is a member of Ed Slott and Company's exclusive Elite IRA Advisor Group℠, Where he is trained in the complicated tax code to ensure his clients and families can keep more of their retirement savings.

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ABOUT ED SLOTT and COMPANY, LLC: Ed Slott and Company, LLC is the nation's leading provider of IRA training for financial advisors. Mr. Slott is the author of multiple best-selling books on retirement distribution planning. He is a nationally recognized IRA-distribution expert, a professional speaker, and the creator of several public television specials, including Ed Slott's Retirement Rescue!

Ed Slott has been quoted in *The New York Times, Newsday, The Wall Street Journal, The Washington Post, Money Magazine*, and *Forbes*. He has appeared on NBC, ABC, CBS, CNBC, CNN, FOX, PBS, Public Television, NPR, and Bloomberg TV and radio.

ABOUT Calrima Financial & Insurance Agency; California Insurance License 0F34289. CALRIMA welcomes requests for more information about recent changes to the tax code and up-to-date information on retirement planning. CALRIMA may be reached at 866-589-9366, toll-free.

* http://www.theslottreport.com/2013/01/your-tax-rate-may-not-have-increased.html
** Restrictions apply, see http://www.iXrayTaxSolutions.com