



Exciting News – S.M.A.R.T. T.A.X. is Joining Forces with Aspire Wealth Management & Tax Center!

Dear Valued Client,

We are excited to share some important news about the future of S.M.A.R.T. T.A.X.!

S.M.A.R.T. T.A.X., LLC is joining forces with Aspire Wealth Management & Tax Center (owned by Todd Schick). This partnership allows us to expand the resources available to you while keeping the same great service you have come to expect. This move also allows Bob and Diana to work towards retirement, while still providing you with the service you expect.

What This Means for You

Same Familiar Faces: Bob and Diana will continue working and be available.

Even More Resources: By combining our teams, we will be able to offer you additional support and services under one roof.

A New Location: As part of this exciting transition, we are moving just 8 minutes down the road to a new, convenient location.

Our New Address:

**17331 E US Hwy 40, Suite 101
Independence, MO 64055**



We can't wait to welcome you to the new office!

You can learn more about Aspire Wealth Management & Tax Center by visiting our website: www.aspirewealthmgt.com. We will also be sending out another letter closer to the start of tax season with additional details.

Thank you for trusting us with your tax and financial needs. We look forward to continuing to serve you and making this transition as smooth as possible.

Warm regards,

Bob & Diana Roberts

Owners, S.M.A.R.T. T.A.X., LLC

Todd Schick, EA, CFPT™, CLU™ & ChFC™
Owner, Aspire Wealth Management & Tax Center



About Our Company

Our vision is to grow continuously while safeguarding your assets and helping you achieve your dreams. We are dedicated to being a source of knowledge and leadership for our clients, staff, and community. With a passion for assisting retirees and their loved ones, we strive to help them realize their financial aspirations.



Wealth Management

- Financial and Wealth Planning
- Investment Management
- Legacy Planning
- Retirement Income Planning
- Insurance
- Tax Strategies
- Social Security Maximization
- Workplace Benefits



Tax Center

- Income Tax Filing
- Accounting
- Payroll
- Bookkeeping
- Financial Statement Preparation
- Business Transition Support
- Payroll Processing & Reporting
- Tax Planning
- Tax Filing Services
- Tax Withholding and Wage Garnishment
- Compliance Support



Call Now:
913-322-3500

Securities offered through CreativeOne Securities, LLC Member FINRA/SIPC. Advisory Services offered through Aspire Wealth Management, LLC a Registered Investment Advisor. Aspire Wealth Management, LLC and CreativeOne Securities, LLC are separate entities.

Office Locations:

17331 E US Hwy 40, Suite 101 Independence, MO 64055
5601 NE Antoich RD Suite 8 Gladstone, MO 64119
7400 W 130TH ST Suite 130 Overland Park, KS 66213

10 things you didn't know about Todd A. Schick

1. Todd is a HUGE Chiefs fan. You can find him at the stadium bright and early for home games, where for many years he has tailgated with longtime friends and cheered loudly in Section 135.
2. Todd enjoyed his time at college, so much so that he not only completed three degrees, but was also an active member of Sigma Pi fraternity.
3. Todd has been an avid golfer since playing alongside his dad at the age of 12. He has one hole-in-one to his credit, recorded in 2018.
4. Todd loves speed. He prefers sports cars and believes a minimum of 350 horsepower is essential.
5. Todd had a beer with Chevy Chase in a comedy club in New York. Chevy heckled the comic on stage, and afterward Todd struck up a conversation.
6. Todd proposed to his wife in Napa, California, while the two ascended on a private hot air balloon and a banner on the ground displayed the message: "I love you. Will you marry me, Susan?"
7. Todd loves all things aviation and aspires to obtain his pilot's license one day. He once pulled 5 Gs in an Italian fighter plane.
8. Todd is known at home as "Dada" by his beautiful daughter, Maddison and "Schickanigans Partner" by his son, Maverick.
9. Todd's bachelor party stayed in the notorious "Hangover" suite, and out of the 19 guys who attended, no one ended up lost.
10. Todd once was a captain—ARRRGH! He was voted captain of his high school soccer team while playing these positions: sweeper, monster man and center striker. He went on to play college soccer as well.

Todd acts as a fiduciary and uses his experience and expertise to help clients work toward their retirement goals.

Knowing each individual's case is one-of-a-kind, Todd does not opt for the cookie-cutter strategy. Instead, he relies on his industry knowledge and experience to develop an optimal, high-quality plan tailored to each client's needs and goals. Todd has also conducted numerous seminars for large corporations.

Todd has passed the Series 7 and 66 securities exams, holds his life and health insurance licenses in Missouri and Kansas, is a Certified Financial Planner® professional and has obtained the Chartered Life Underwriter® and Chartered Financial Consultant designations. Additionally, he has earned his Enrolled Agent designation, demonstrating his expertise in tax matters and allowing him to represent clients before the IRS.

He holds three degrees from Missouri State University: two in computer information systems and one in finance. A Kansas City native, Todd is dedicated to family values, personal initiative and changing his clients' lives for the better. He enjoys playing golf, supporting charity events and exercising. Todd is also pursuing his lifelong dream of becoming a pilot. Todd has a loving wife, Susan, that holds down the fort, and is the backbone of many of Todd's endeavors, including their son, Maverick and their daughter, Maddison.



Securities offered through CreativeOne Securities, LLC Member FINRA/SIPC. Advisory Services offered through Aspire Wealth Management, LLC a Registered Investment Advisor. Aspire Wealth Management, LLC and CreativeOne Securities are separate entities.

Tax services are offered through Aspire Tax Center. CreativeOne Securities and Aspire Wealth Management, LLC do not offer tax or legal advice.

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