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By: *Holly Swan* | *April 17, 2024*

Is the uncertainty about tax reform resulting in tough conversations with existing and prospective clients? After-tax advisors can help clients navigate the uncertainty and provide clarity with a tax tenet: Uncle Sam can be a coach, not simply a referee.

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Did you approach your last networking event full of intention with the hope of meeting new people, only to get caught up in conversation with one or two encounters? Perhaps it's time to discover the power of "the disengage" when it comes to making first encounters count.

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[A More Effective Way to Measure Tax Impact](#)

By: *Holly Swan* | *April 4, 2024*

Many clients look to their highest marginal bracket when measuring tax impact, yet there's a more accurate way to understand tax impact—the effective tax rate.

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[Leverage The BEAT to Spring Client Conversations Forward](#)

By: *David Richman* | *March 26, 2024*

The power of a well-developed thesis can spring conversations forward when existing and prospective clients are buzzing about today's market memes and potential implications to their financial decision-making.

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[Five Tax-Aware Questions to Ask Before Major Wealth Events](#)

By: *Holly Swan* | March 20, 2024

Let's explore five open-ended questions you can ask clients undergoing major wealth events—such as an inheritance, business sale or large asset transfer. These questions allow for deeper discovery and can help you ensure their tax planning strategies and financial goals are aligned.

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By: *David Richman* | March 13, 2024

Some of the most successful teams we encounter are family practices. This makes us wonder: what are the nuances of such high-functioning family teams that might be replicated in non-family practices?

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[Optimize and Maximize: Tax Planning for Major Life Events](#)

By: *Holly Swan* | March 6, 2024

Life is full of significant moments that bring joy, change, and new responsibilities. You can bring value to your clients during these times by helping them navigate the income tax planning opportunities that accompany them.

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[Increase Interest in Split-Interest Giving for Tax Advantages](#)

By: Holly Swan | February 27, 2024

These are uncertain times for taxes. The combination of the Tax Cuts and Jobs Act sunset and an upcoming election has [tax laws hanging in the balance](#). Clients likely feel the uncertainty and wonder what they should do to prepare for different outcomes.

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[There Are No Called Balls or Strikes with Succession Opportunities](#)

By: David Richman | February 21, 2024

Recent consults on the topic of succession have highlighted a shift reflecting the demographics of our industry. Mid-career advisors are now in the driver's seat with increasing numbers of older advisors looking for successors.

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[Tax Laws Hang in the Balance: Preparing Clients for a Potential Sunset](#)

By: Holly Swan | February 16, 2024

Let's look past the typical 2024 election headlines and consider one issue that might not be in your election newsfeed—the possible sunset of the Tax Cuts and Jobs Act of 2017 (TCJA) at the end of 2025.

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[Concentrated Positions](#)
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By: Holly Swan | February 14, 2024

Investing in a single stock or concentrated position is both exciting and risky—offering the potential for substantial returns while simultaneously exposing investors to significant volatility. Therein lies the conundrum of concentrated positions.

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By: Holly Swan | February 7, 2024

During tax season, you can be of great value to clients even though you're not a tax professional. This is especially true for your clients who receive employer stock. When it comes to incentive compensation, remember:

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