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Our latest commentary to help you elevate the success of your practice

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Of all the ways an advisor can form meaningful, multigenerational connections with clients, few are more powerful than amplifying their existing charitable intents. The After-Tax Advisor<sup>®</sup> helps charitably inclined clients understand that while writing a check is easy and convenient, a little planning can lead to better donor outcomes.

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While the Build Back Better Act remains stalled, the existing rules most taxpayers must live with create challenges for charitably inclined taxpayers and opportunities for an After-Tax Advisor.

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Changing family dynamics during the pandemic may have encouraged clients to rethink their succession and estate plans. Whether it's a fresh glimpse of our own mortality or a new appreciation of a supportive family member, shifting perspectives can be just the impetus clients need to review their documents and clarify their intentions.

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By: *Eaton Vance* | July 6, 2022

If you approach prospective and existing clients on the topic of estate planning, most will say, "We're all set." Maybe break the ice by asking them: "Do you have any dusty trusts? A dusty trust so old, you have to blow the dust off of it to find out what's in it?"

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This tax year—like every tax year before it—will end on December 31. This truism means that the opportunity to help your clients improve tax outcomes is time-sensitive. The clock is always ticking, and the end of June marks the halfway point.

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Have you ever noticed what happens in a conversation when you use the word "loss"? The typical reaction is that the other person stops listening as soon as the word leaves your lips. It's as if that other person is struggling to find a way to explain to you that they don't want to lose money. Nobody does, of course, but it happens. How can you turn these loss conversations into client wins?

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By: Eaton Vance | May 18, 2022

How long do clients have to prevent a recurrence of an unpleasant income tax filing? The short answer is "the rest of the year." Therefore, if a taxpayer discovers underwithholding in May, there are only seven months to correct it before year-end.

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Publication details: Thursday, June 23, 2022 11:21 AM

Page ID: 4600 - <https://funds.eatonvance.com/advisor-institute-coachs-corner.php>