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For clients seeking cost-effective diversification, some of the most widely used approaches include mutual funds, exchange-traded funds and separately managed accounts. While all of these vehicles can offer broad-based diversification, they each have unique tax implications. That's why it's important to talk to your clients about why asset **location** can be just as

important as asset **allocation**.

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By: Holly Swan | November 10, 2022

The After-Tax Advisor® looks for ways to help create a better tax experience by proactively identifying issues and opportunities as clients' lives evolve. Understanding your clients' current situations while also anticipating future taxable events are the building blocks of tax-aware plans.

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[Asset Location Can Be as Important as Asset Allocation](#)

By: Holly Swan | November 2, 2022

Most investors are familiar with asset allocation yet asset location is just as important, as it can have a bigger impact on reducing taxable income, generating tax-advantaged growth and keeping more of what they have worked so hard to save.

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By: Holly Swan | October 25, 2022

Your clients have likely heard this saying, coined by Speaker of the House Thomas "Tip" O'Neill (D-MA). "All politics is local" speaks to the importance of communicating national initiatives in locally relevant terms. The After-Tax Advisor® recognizes and communicates that election results—both federal and local—and local ballot initiatives can have a lasting impact on clients' portfolios.

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By: Holly Swan | October 12, 2022

Many clients sometimes go years without talking to their estate planning attorneys, which presents an opportunity for you to be a catalyst for estate planning conversations as clients' lives evolve or during turbulent markets.

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['Location, Location, Location'](#)

By: Holly Swan | October 5, 2022

While many prospective clients will know this popular real estate phrase, they might not realize that "location, location, location" is also a crucial consideration for their investment portfolios. The After-Tax Advisor[®] can attract prospective clients by helping them understand this tax tenet: "Asset location can be as important as asset allocation."

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['Not All Shares Are Created Equal'](#)

By: Holly Swan | September 20, 2022

As you know, likely all too well, there are times when an existing or prospective client's preconceived thoughts about their company stock prevent them from recognizing the value of diversification. Instead of diving right in to the tactical merits of diversification, which may cause them to become defensive, what if you took a different approach?

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[Below-the-Waterline Risk](#)

By: Holly Swan | September 14, 2022

If you have clients working for large public companies, they may have a source of risk that lurks below the water line, like most of an iceberg. That risk is employer stock inside an employer-sponsored qualified plan, such as a 401(k) plan, and it can become a client's largest exposure to employer stock. Whereas the stock you see "above the waterline"—equity awards—may be much smaller.

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