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If you have clients working for large public companies, they may have a source of risk you cannot see. It lurks below the waterline like the majority of an iceberg. That risk is employer stock inside an employer-sponsored qualified plan, such as a 401(k) plan, and it can silently become a client's largest exposure to employer stock. The stock you see "above the waterline" — their equity awards — may be much smaller.

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By: David Gordon | September 2, 2021

As advisors and clients await clarity on the Biden administration's proposed capital gains tax increases, it is a good time to remind ourselves of an often-overlooked opportunity — tax-loss harvesting — and explain it to clients. Regardless of what Congress ultimately decides, the ability to reduce taxable capital gains with unused capital losses seems likely to remain in place, as neither Congress nor the White House has proposed eliminating this capital gains/losses offset.

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