



Tax Forward 365® Monthly Planner

Timely actions and resources for adding year-round value

FEBRUARY
2024

MARCH
2024

APRIL
2024



Engage
current
clients

Action step

- ▶ Help clients understand the tax challenges and investment decisions that can accompany major life events. Know the impact taxes have by creating a personalized plan for your clients that grows with them as their lives evolve.



Attract new
clients

Action step

- ▶ Ask prospective clients if they are expecting any major life events and, if yes, how are they planning for them.

Helpful resources

- ▶ [BLOG: Optimize and Maximize: Tax Planning for Major Life Events](#)
- ▶ [BROCHURE: U.S. Legacy Income Trusts Advised Donor¹](#)

Helpful resources

- ▶ [INFOGRAPHIC: Tax-Planning for Life Events](#)
- ▶ [VIDEO: Who can benefit from U.S. Legacy Income Trusts?¹](#)

¹ The U.S. Legacy Income Trusts® are offered by the U.S. Charitable Gift Trust®.

Key dates*

MARCH 15:

- ▶ Deadline for S corporations to file returns and pay taxes for tax year 2023 or to request an extension (Form 7004)

MARCH 31:

- ▶ Deadline for businesses to e-file Forms 1099 and 1096 to the IRS, except Form 1099-NEC

*Source for all non-Eaton Vance event dates: Internal Revenue Service

EXPLORE MORE TAX-FORWARD RESOURCES ▶

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