LEARN | Tax Planning for Life Events

Major life events often come with tax challenges and investment decisions. Know the impact taxes have by creating a personalized plan for your clients that grows with them as their lives evolve.

Prefer to save for later?

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Key Takeaway

April 15th is not the only important tax event of the year. Help your clients understand the tax challenges that can accompany events that they wouldn't necessarily think of as tax events.

Major Life Events to Discuss

Select an area to learn more about the tax benefits and challenges of each major life event.



Marriage or Divorce



A New Baby



Buying a House



Selling a Business



Retirement

Next Step

Review key tax dates, deadlines, and potential deductions for the year with your client.

KEEP LEARNING

4 Approaches to Help Reduce Taxes

LEARN MORE

Disclosure

Tax-loss harvest transactions aren't beneficial in a retirement account because the losses generated in a tax-deferred account cannot be deducted.

The Firm does not provide tax advice. The tax information contained herein is general and is not exhaustive by nature. Tax laws are complex and subject to change. Investors should always consult their own legal or tax professional for information concerning their individual situation.

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