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# LEARN | Taxes Matter: 3 Questions to Ask

3 minutes

Every tax year can be different, and adjustments should be considered continually. Elevate the tax planning services you provide by first knowing which questions to ask clients and prospects.

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## Did You Know?

89% of high net worth and ultra high net worth investors expect tax planning from their advisors, but only 25% receive it.\*



## Key Takeaway

By having informed conversations about taxes with your clients and prospects, you are not only demonstrating your expertise, you are setting yourself apart from other financial advisors by asking the right questions.

## 3 Questions to Ask

Select a question to learn more about why it's important to raise the topic in your conversations.

**Question**

What detracts more from investment outcomes: fees or taxes?

**Question**

How much of an impact do taxes have on your investments each year?

**Question**

Are you open to looking for ways to reduce the amount you pay in taxes each year?

## Next Step

How clients and prospects answer these questions can help you gauge their level of interest in tax-planning services.

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### Disclosure



\*Source: Spectrem Group, "Wealth Management Redefined", 2021, p. 24

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Publication details: Thursday, October 27, 2022 10:06 AM

Page ID: 43144 - <https://funds.eatonvance.com/taxes-matter-questions-to-ask.php>