Coach’s Corner

Our latest commentary to help you elevate the success of your practice

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Working with the Wealthy
Estate of Affairs: Improve Legacy Outcomes With Year-End Conversations
By: Holly Swan | November 29, 2023

Year-end is a great time for your clients to discuss estate planning with their family as they gather to celebrate the holidays. Here are questions you can incorporate in your year-end conversations to get clients thinking about having, or starting, the wealth transfer conversation with their tax team and family members.
Year-end is an important time to hone your agendaless listening. People may be more busy or stressed than usual—perhaps in part due to recent global events—and the best way to meaningfully help someone during these times is to slow down your own thoughts and actively listen. So, drop your agenda and learn what matters most to existing and prospective clients right now. Here's how.

Did you know that almost one-third of all charitable giving in the U.S. occurs in December, and 10% of annual giving will occur over the last three days of the year?¹ Last minute giving often results in cash donations, which are rarely the most tax-efficient way for your clients to support their favorite charitable organizations.

How can you use the weeks ahead to set the stage for meaningful planning conversations in the new year? Simply by asking intentional questions in your year-end calls with clients.

¹ After-Tax Advisor
How can you inspire clients to proactively look for opportunities to minimize and/or defer taxes to increase the benefits of compounding?

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By: Holly Swan | October 16, 2023

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Talking Politics: Have a Thesis, Not an Opinion
By: David Richman | October 10, 2023

With much political theater anticipated in the months ahead, we recommend taking this opportunity to share your thesis, not your opinion, on tax policies with existing and prospective clients.

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Asset Location Can Be as Important as Asset Allocation
By: Holly Swan | October 4, 2023

While clients may know the importance of asset allocation and how it can impact pre-tax returns, many overlook asset location, which can strongly influence what remains after taxes. A comprehensive investment plan should help improve after-tax outcomes by coordinating asset allocation with asset location.

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By: Holly Swan | September 27, 2023

A common misperception about initial public offerings (IPOs) is that they are an immediate liquidity event for both the company and its shareholders. Yet, more often than not, shareholders can be subject to sale restrictions and holding periods, and, if they have the ability to liquidate, they may not plan to do so.

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Simplifying QSBS: Tax Benefits and Questions To Ask
By: Holly Swan | September 20, 2023

One of the best examples of Uncle Sam being a coach, rather than a referee, is the qualified small business stock (QSBS) exclusion. While you don't need to know the ins and outs of the Internal Revenue Code (IRC), understanding the benefits of QSBS from a tax perspective can help you ask questions to spot issues and opportunities that should be addressed by your clients' tax advisors.

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Concentrated Positions

What Lies at the Heart of Concentrated Positions?
By: Holly Swan | September 13, 2023

Often, deeply held biases inhibit rational decision-making and lead to an unwillingness to diversify. Understanding common biases you may encounter and asking the right questions can help you move the concentration conversation toward diversification.

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4 Steps to Capture Referable Moments
By: David Richman | September 6, 2023

Imagine an exercise that can help align team messaging, unlock your differentiated brand, make first encounters count AND increase the odds of capturing referable moments. That exercise is "ism" development and articulation.

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Publication details: Tuesday, November 28, 2023 11:55 AM