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When you call a prospective client, would you say that your purpose is to get a meeting? What if you reframe the purpose of your call to determine if a meeting makes sense? You might think there's a subtle difference—hardly. We think the benefits are considerable.

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## [What to Do When Tax Bills Catch Clients by Surprise](#)

By: Holly Swan | May 1, 2024

Have you ever met a client who feels undertaxed? No? Neither have we. Paying a tax bill can be even more painful when the amount is larger than expected. Even carefully calculated withholding amounts can be insufficient if clients receive supplemental wage income, investment income or other payments during the year.

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## [Replace the Commonplace: Start Conversations Without "How Are You?"](#)

By: David Richman | April 30, 2024

Consider the cost of asking this question rather unwittingly, without a moment's reflection at the start of your follow-up phone calls: "How are you?" While cordial and somewhat deferential, it's oh so commonplace.

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## [Cocktail Parties, Concentrated Positions and the CAR Framework](#)

By: Holly Swan | April 24, 2024

Let's say you meet someone at a cocktail party who, upon hearing what you do for a living, confides they don't know what to do with a highly appreciated concentrated stock position. How can you respond to lay the groundwork for a potential follow-up conversation? Use the CAR framework: Celebrate. Ask. Remind.

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## [Seize Opportunities Presented by Volatility with a Thesis](#)

By: David Richman | April 22, 2024

Recent volatility creates conversation opportunities with existing and prospective clients. Success is anchored to this fundamental tenet:

**"We get paid to have an opinion."**

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### [Mine The BEAT to Help Make First Encounters Count](#)

By: *David Richman* | *April 18, 2024*

With so many economic crosscurrents and geopolitical tensions, do first encounters ask you what you're telling clients when they find out you are a financial advisor? Use an ism and, perhaps, a thesis as answers.

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### [Uncle Sam Can Provide Certainty in Uncertain Times](#)

By: *Holly Swan* | *April 17, 2024*

Is the uncertainty about tax reform resulting in tough conversations with existing and prospective clients? After-tax advisors can help clients navigate the uncertainty and provide clarity with a tax tenet: Uncle Sam can be a coach, not simply a referee.

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### [Discover the Power of the Disengage](#)

By: *David Richman* | *April 10, 2024*

Did you approach your last networking event full of intention with the hope of meeting new people, only to get caught up in conversation with one or two encounters? Perhaps it's time to discover the power of "the disengage" when it comes to making first encounters count.

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## [A More Effective Way to Measure Tax Impact](#)

By: Holly Swan | April 4, 2024

Many clients look to their highest marginal bracket when measuring tax impact, yet there's a more accurate way to understand tax impact—the effective tax rate.

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## [Leverage The BEAT to Spring Client Conversations Forward](#)

By: David Richman | March 26, 2024

The power of a well-developed thesis can spring conversations forward when existing and prospective clients are buzzing about today's market memes and potential implications to their financial decision-making.

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[Working with the Wealthy](#)

## [Five Tax-Aware Questions to Ask Before Major Wealth Events](#)

By: Holly Swan | March 20, 2024

Let's explore five open-ended questions you can ask clients undergoing major wealth events—such as an inheritance, business sale or large asset transfer. These questions allow for deeper discovery and can help you ensure their tax planning strategies and financial goals are aligned.

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By: David Richman | March 19, 2024

What is your biggest competitor year in and year out? Client inertia.

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### [A Lesson from the Best Family Practices](#)

By: David Richman | March 13, 2024

Some of the most successful teams we encounter are family practices. This makes us wonder: what are the nuances of such high-functioning family teams that might be replicated in non-family practices?

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### [Optimize and Maximize: Tax Planning for Major Life Events](#)

By: Holly Swan | March 6, 2024

Life is full of significant moments that bring joy, change, and new responsibilities. You can bring value to your clients during these times by helping them navigate the income tax planning opportunities that accompany them.

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### [Increase Interest in Split-Interest Giving for Tax Advantages](#)

By: Holly Swan | February 27, 2024

These are uncertain times for taxes. The combination of the Tax Cuts and Jobs Act sunset and an upcoming election has [tax laws hanging in the balance](#). Clients likely feel the uncertainty and wonder what they should do to prepare for different outcomes.

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### [There Are No Called Balls or Strikes with Succession Opportunities](#)

By: David Richman | February 21, 2024

Recent consults on the topic of succession have highlighted a shift reflecting the demographics of our industry. Mid-career advisors are now in the driver's seat with increasing numbers of older advisors looking for successors.

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## [Tax Laws Hang in the Balance: Preparing Clients for a Potential Sunset](#)

By: *Holly Swan* | February 16, 2024

Let's look past the typical 2024 election headlines and consider one issue that might not be in your election newsfeed—the possible sunset of the Tax Cuts and Jobs Act of 2017 (TCJA) at the end of 2025.

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## [Solve the Concentration Conundrum with Exchange Funds](#)

By: *Holly Swan* | February 14, 2024

Investing in a single stock or concentrated position is both exciting and risky—offering the potential for substantial returns while simultaneously exposing investors to significant volatility. Therein lies the conundrum of concentrated positions.

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