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

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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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[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 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

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[Timing Matters for ISOs and AMT](#)

By: Holly Swan | February 7, 2024

During tax season, you can be of great value to clients even though you're not a tax professional. This is especially true for your clients who receive employer stock. When it comes to incentive compensation, remember:

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[Incentive Compensation: Let the Tax Code Be Your Guide](#)

By: Holly Swan | January 17, 2024

Many U.S. companies grant equity awards at year-end, and advisors come face-to-face with clients who might not know what their employer's stock is worth.

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[Attracting Clients](#)
[Your First Question to Clients in 2024](#)

By: David Richman | January 10, 2024

With the holidays behind us, now is the perfect time to reach out to both your existing and prospective clients with the following question: "What is the **one thing** you'd like to accomplish in the year ahead, and how can I help?"

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[After-Tax Advisor](#)
[Start 2024 Strong by Being an After-Tax Advisor](#)

By: Holly Swan | January 8, 2024

A financial advisor's success in today's highly competitive market is dependent on high-touch, personalized services that make wealthy investors' goals more attainable. The three tenets of The After-Tax Advisor are a guide to deliver the added planning value your clients are looking for to achieve their financial goals.

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[Make New Year's Resolutions with Intentionality, Not Intention](#)

By: David Richman | January 4, 2024

Why is it that the New Year's resolutions we make are rarely achieved? It's because we often make them full of intention, rather than intentionality.

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