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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.



Holly Swan
Executive Director
Advisor Institute

After-Tax Advisor | Elections

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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By: Holly Swan | April 4, 2024

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## After-Tax Advisor

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

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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# After-Tax Advisor | Elections

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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