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Given the impending sunset of The Tax Cuts and Jobs Act (TCJA), and the potential for the current estate tax exemption to be cut in half, many of your clients may feel pressure to make large gifts now. But it can be hard for clients to part with control and access to a significant portion of their wealth. How can you open the door to discussing their options while also acknowledging that any solution will likely be viewed as a compromise on their part?

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By: Eaton Vance | June 19, 2024

The client interview is at the heart of our [5 steps to better first meetings](#), because it is an opportunity to ask discovery questions to help provide insight into how life and money intersect for each prospective client. As you prepare for a first meeting with a prospective client, it's important to ask questions that can help uncover the source of their wealth and any biases they may have when it comes to their portfolios.

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With the impending sunset of the Tax Cuts and Jobs Act ("TCJA"), investors face unprecedented uncertainty about the impact to their portfolios. With the future of tax law unknown, how do you help alleviate existing and prospective clients' concerns? Consider an ism inspired by a famous Wayne Gretzky quote: "Skate to where the puck is going to be, not where it has been."

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[Harvest Tax Losses Midyear to Help Grow Returns](#)

Your clients likely think of year-end when they hear the term tax-loss harvesting, the practice of strategically selling assets that have experienced a decline in value to offset capital gains or taxable income. As an After-Tax Advisor, you know the importance of a year-round tax-loss harvesting strategy. Midyear is a great time to check in and remind clients of the ways they can minimize their tax liabilities and help maximize returns with tax-loss harvesting.

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Publication details: Wednesday, June 5, 2024 12:02 PM

Page ID: 4600 - <https://www.eatonvance.com/advisor-institute-coachs-corner.php>