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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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[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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[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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[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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[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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[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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[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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[Concentrated Positions](#)

[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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[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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