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Three Ways High Earners Can Take Advantage of the Tax Cut and Jobs Act (TCJA) Before It Sunsets

By: Eileen Tam | February 12, 2024

While we do not anticipate any meaningful changes in U.S. tax laws this year, high earners should consider three ways to prepare for the Tax Cut and Jobs Act (TCJA) to sunset in 2025. The TCJA enacted in 2018 benefited many affluent taxpayers by more than doubling the gift and lifetime exemptions, slashing tax rates for the highest bracket from 39.6% to 37%, and significantly reducing the impact of the alternative minimum tax (AMT).[1] Acting now may lead to potential significant savings.

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Eileen Tam
Director of Philanthropic Solutions
Eaton Vance

Legislation | Taxes

How Bracket Creep, Capital Gains and the Election May Impact what Taxpayers Owe the Government

By: Jeremy Milleson | February 8, 2024

The brackets of March Madness can consume both diehard fans and casual followers of college basketball. Old rivalries are stoked, and friendly wagers are made among friends, neighbors and coworkers. This annual rite of spring seems perfectly timed to set a cheerful tone—it may even be therapeutic. Just a few weeks after the tournament concludes, a different set of brackets takes center stage in the lives of U.S. taxpayers.

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Jeremy Milleson
Director
Investment Strategy
Parametric

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