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LEARN | 4 Approaches to Help Reduce Taxes

Wealthier investors tend to have more complex tax challenges. You can have a more informed conversation with your client by discussing the investment approaches that can work to their advantage.

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Key Takeaway

By understanding how these approaches can help reduce taxes, you can build a better tax experience for your clients.

4 Approaches to Discuss With Your Clients

Select each topic to learn more about how it fits into your client's year-round tax management.

Approach

Start the concentrated stock conversation

Approach

Realize tax losses to reduce taxable gains*

Approach

Maximize charitable giving opportunities

Approach

Identify the right tax advantaged accounts



Next Step

Consider which of these approaches are most relevant to discuss with each of your clients.

**Tax-loss harvesting isn't beneficial in a retirement account because the losses generated in a tax-deferred account cannot be deducted.*

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Tax-loss harvest transactions aren't beneficial in a retirement account because the losses generated in a tax-deferred account cannot be deducted.

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