Tax Forward 365® Monthly Planner

Timely actions and resources for adding year-round value

APRIL 2024 · **MAY 2024** · JUNE 2024

Engage current clients

Action step

- Communicate with clients' broader tax teams to identify any areas for improvement so that needed changes can be implemented in the next 7-8 months.

Helpful resources

- **BLOG:** What to Do When Tax Bills Catch Clients by Surprise
- **TOOL:** Eaton Vance Parametric Investment Tax Calculator

Attract new clients

Action step

- Ask if there were any unpleasant surprises during tax preparation and/or filing this year.

Helpful resources

- **INFOGRAPHIC:** 4 Approaches to Help Reduce Taxes
- **VISIT:** Tax Management Center

EXPLORE MORE TAX-FORWARD RESOURCES ▶

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