



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.



Attract new
clients

Action step

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

Helpful resources

- [BLOG: What to Do When Tax Bills Catch Clients by Surprise](#)
- [TOOL: Eaton Vance Parametric Investment Tax Calculator](#)

Helpful resources

- [INFOGRAPHIC: 4 Approaches to Help Reduce Taxes](#)
- [VISIT: Tax Management Center](#)

EXPLORE MORE TAX-FORWARD RESOURCES ►

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