



Tax Forward 365® Monthly Planner

Timely actions and resources for adding year-round value

MAY
2024

JUNE
2024

JULY
2024



Engage
current
clients

Action step

- ▶ Help clients anticipate systematic tax-loss harvesting opportunities for the remaining six months of the year. Review any gains that have already been realized and attempt to estimate gains that might be realized in the next six months.



Attract new
clients

Action step

- ▶ Discuss the potential value of tax losses, and identify which investment vehicles can distribute realized losses.

Helpful resources

- ▶ [INFOGRAPHIC: Tax Treatment of Different Investment Vehicles](#)
- ▶ [VIDEO: How Does Tax-Loss Harvesting Work?](#)

Helpful resources

- ▶ [BLOG: Harvest Tax Losses Midyear to Help Grow Returns](#)
- ▶ [INSIGHT: What is Tax Management?](#)

Key dates*

JUNE 15:

- ▶ Deadline for second-quarter estimated tax payments for the 2024 tax year

*Source for all non-Eaton Vance event dates: Internal Revenue Service

EXPLORE MORE TAX-FORWARD RESOURCES ▶

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