

Tax Education Center

Explore a variety of topics to help clients grow after-tax wealth

[Tax-Forward Approach](#)[Tax Tools](#)[Resources](#)

Take A Tax-Forward Approach

Differentiate your practice with these timely topics designed to drive meaningful conversations and help clients keep more of what they earn.



Tax Management Approaches

[Tax Treatment of Different Investment Vehicles](#)

NEW

3 minutes

[Benefits of Deferring Taxes](#)

NEW

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[Understanding Tax-Equivalent Yield](#)

NEW

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[Year-Round Tax Planning, Simplified](#)

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[The Importance of Asset Location](#)

2 minutes

[Why Taxes Matter](#)

2 minutes

[Three Ways to Start the Tax Conversation](#)

2 minutes





Novel Ways to Talk About Taxes

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How Taxes Impact Wealth

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4 Approaches To Help Reduce Taxes

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Taxes Matter: 3 Questions to Ask

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Tax Advantages of Different Accounts

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[Understanding Itemized Deductions](#)

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[3 Questions for Tax-Smart Planning](#)

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[Tax Advantages of Donor-Advised Funds](#)

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[Ways to Give](#)

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[Charitable Donations: Why Choose Stock Over Cash?](#)

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[Three Scenarios Where Planned Giving Can Make a Difference](#)

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[Benefits of Donating Concentrated Stock](#)

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[Start the Wealth Transfer Conversation](#)

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[Beyond Taxes: Reasons for Estate Planning](#)

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[Understanding the Estate Tax](#)

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[Know the Core Estate Planning Documents](#)

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[When to Consider Diversifying Concentrated Shares](#)

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[Three Types of Incentive Compensation That Require Tax Planning](#)

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[Reducing Taxes on Incentive Compensation](#)

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[Restricted Stock Units \(RSUs\): Incentive Compensation](#)

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[Nonqualified Stock Options \(NQSOs\): Incentive Compensation](#)

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[Incentive Stock Options \(ISOs\): Incentive Compensation](#)

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[Investment Concentration: 3 Questions to Ask](#)

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Access Year-Round Tax Tools



[Investment Tax Calculator](#)

Determine your combined total tax rate, including federal, state and local taxes, for investment income and gains.

[Tax-Equivalent Yield Calculator](#)

Compare yields of in-state muni bonds with out-of-state munis and taxable bonds on a tax-equivalent basis.

[Concentrated Stock Position Calculator](#)

See how diversifying your portfolio on a tax-deferred basis may be a better option than a taxable sale.



[Laddered Investing Interest Rate Scenario Tool](#)

Explore how laddered portfolios may perform in an environment of changing interest rates.



[Charitable Tax Benefit Calculator](#)

See the potential savings in income taxes you could realize by donating cash or appreciated securities.

Explore More Tax Resources From Our Experts



[Talking Taxes with Clients](#)

Guidance for framing tax conversations



[2024 Tax Information](#)

Rates, schedules and contribution limits



[Tax Forward 365® Planner](#)

Timely actions and resources for adding year-round value



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