

PRODUCT FINDER

WEALTH STRATEGIES

INVESTMENTS

INSIGHTS

TAXES AND TOOLS

Tax Education Center

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

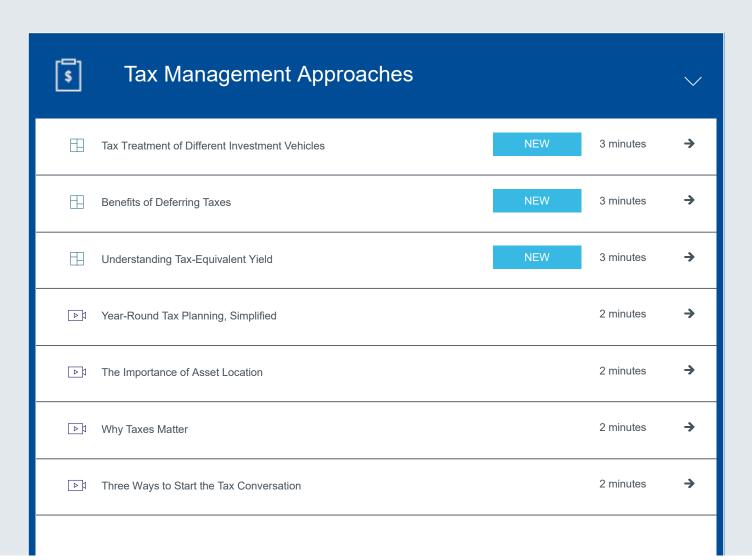
Tax-Forward Approach

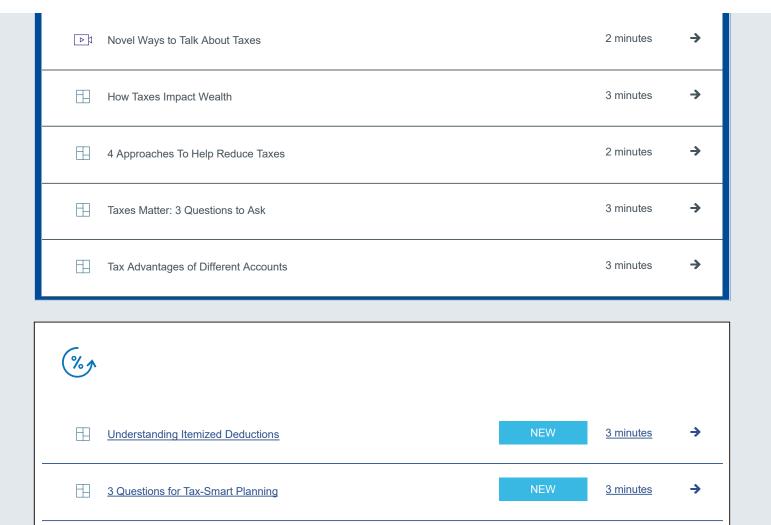
Tax Tools

Resources

Take A Tax-Forward Approach

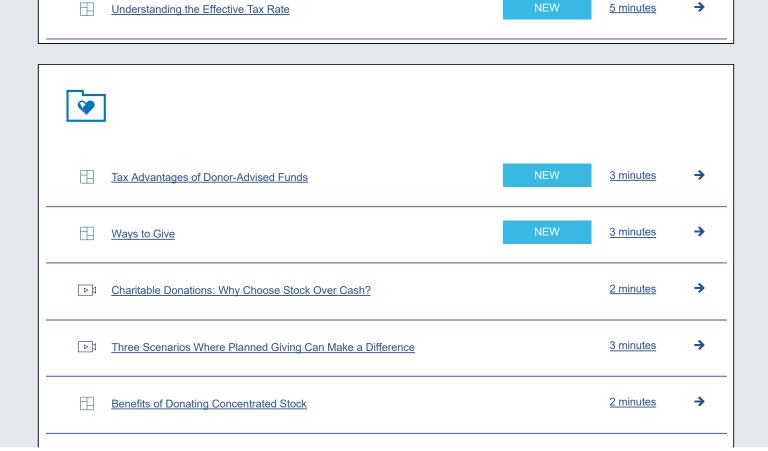
Differentiate your practice with these timely topics designed to drive meaningful conversations and help clients keep more of what they earn.





5 minutes

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Income Taxes: What You Need to Know Now

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	Start the Wealth Transfer Conversation	NEW	3 minutes	→
	Beyond Taxes: Reasons for Estate Planning	NEW	3 minutes	→
	Understanding the Estate Tax	NEW	3 minutes	→
	Know the Core Estate Planning Documents	NEW	3 minutes	→
	Tax Planning for Life Events		3 minutes	→

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	When to Consider Diversifying Concentrated Shares	3 minutes	→
	Three Types of Incentive Compensation That Require Tax Planning	3 minutes	→
	Reducing Taxes on Incentive Compensation	2 minutes	→
	Restricted Stock Units (RSUs): Incentive Compensation	3 minutes	→
	Nonqualified Stock Options (NQSOs): Incentive Compensation	2 minutes	→
	Incentive Stock Options (ISOs): Incentive Compensation	3 minutes	→
	Investment Concentration: 3 Questions to Ask	3 minutes	→

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



<u>Talking Taxes with Clients</u> <u>Guidance for framing tax conversations</u>





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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Boston, MA 02110

Investments

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Taxes & Tools

Investment Tax Center

Tax Information

Tax IIIIOIIIIalioii

Investment Tax Calculator

<u>Laddered Investing Interest</u> Rate Scenario Tool

Concentrated Stock
Position Calculator

Tax-Equivalent Yield

Calculator

<u>Resources</u>

Forms & E-Delivery

Mutual Funds & Abandoned

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