

# 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

3 minutes

[Understanding Tax-Equivalent Yield](#)

NEW

3 minutes

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

2 minutes

[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

2 minutes



How Taxes Impact Wealth

3 minutes



4 Approaches To Help Reduce Taxes

2 minutes



Taxes Matter: 3 Questions to Ask

3 minutes



Tax Advantages of Different Accounts

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[Understanding Itemized Deductions](#)

NEW

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

NEW

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[Income Taxes: What You Need to Know Now](#)

NEW

[5 minutes](#)



[Understanding the Effective Tax Rate](#)

NEW

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

NEW

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[Ways to Give](#)

NEW

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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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[Charitable Giving: 3 Questions to Ask](#)

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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

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[Tax Planning for Life Events](#)

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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](#)

[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



### [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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